

LIFELONG LEARNING IN AOTEAROA NEW ZEALAND

GLOBALISATION, PARTICIPATION & THE EDUCATION OF ADULTS

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Section 1

Discourses of Lifelong Learning and Adult Education

This book consists of four sections. The first sets the scene, describes the origins and purposes of the book, and identifies several themes which arise again and again throughout the book. The first chapter describes the purposes of the book. This is followed by a discussion of issues surrounding the task of defining lifelong learning and adult education within an historical context. The second chapter consists of an extensive discussion of discourses on lifelong learning and adult education over the period from the early 1970s to the 1990s, while the third discusses some of the ways in which these discourses have shaped and been shaped by policy development during the first three years of the 21st century.

The second section addresses issues of participation. Its concern is as much methodological as substantive, and is intended to illustrate two sharply contrasting research approaches. Chapter 4 adopts a quantitative perspective and presents data on trends in educational participation by adults over a twenty-year period from 1977 to 1996. Chapter 5 adopts a qualitative approach and presents a picture of the experiences and perspectives on learning and education of a small sample of people from working class backgrounds.

The third and largest section of the book, which consists of six chapters, focuses on a wide range of issues. The first three chapters address curriculum issues in lifelong learning and adult education. Chapter 6, presents an overview of the impact of neoliberalism on the curriculum of lifelong learning and adult education in one New Zealand city in the 1980s and 1990s; and chapter 7, looks at changes during the same period in one 'curriculum area', viz. adult education programmes for active citizenship. These are defined as those programmes which focus explicitly on raising public awareness and/or promoting public action on issues of policy. Chapter 8 looks at the impact of neoliberal policies at the level of the State on the programmes of one local voluntary organisation, the Canterbury WEA; while chapter 9 explores the impact of these policies on the introduction of the New Zealand Qualifications Framework. Chapter 10 traces the history of educational policies and programmes for older people; and chapter 11, looks at lifelong learning and adult education and the university.

The fourth and final section consists of only one chapter. This chapter, chapter 12 attempts to summarise some key policy implications and research questions which arise out of the varied studies contained in the book.

Chapter 1

Introduction

Origins and aims of this book

This book has grown out of extensive research and reflections over a period of ten years or so. It is, however, grounded in experiences and influences which go back very much further to my days in South Africa in the 1960s and 1970s before moving to New Zealand in 1978. It was in these years that my thinking about the role of adult education in promoting social justice began to take shape. It was in *apartheid*-dominated South Africa that I learned to see most forms and practices of education as reflecting the interests of predominant power structures and being constituted by dominant discourses. It was in this environment that I first learned to understand the nature of class, gender and race as well as other social forces and their impact on all educational endeavours. The impact of these forces in a South African society characterised by massive inequalities was crystal clear to anyone who cared to look. However, I also came to see any particular educational form or practice as one which potentially constituted a site of struggle in Gramscian terms as well as recognising the Freirean principle that there can be no education that is politically neutral. Thus I came to believe that although education is shaped by

Although three chapters, chapters 5, 7 and 9, are based on previously published articles, most of the research reported here is original and has not previously been published. The book is intended to throw light on a wide range of issues in the field of lifelong learning and adult education, as well as raising critical questions of policy and practice. It should be useful to researchers and teachers, as well as students and practitioners interested in understanding lifelong learning and adult education and all those interested in policy development.

The focus of the book is on lifelong learning and adult education in Aotearoa New Zealand in the late-twentieth and early twenty-first centuries. It is thus situated in a particular place and at a time of major social, cultural, political and economic change. These changes have been both global and local, as the forces of multinational capital looked to extend their sway. In the process these forces reduced the capacity of nation-states to deliver public services including educational services considered by many to be essential to the development of lifelong learning.

Although the book is necessarily focused on a particular time and place, many of the themes addressed are common to other times and places. For this reason, I have related the discussions

to comparable discussions held elsewhere and at other times. My approach is generally historical. In addition, the discussions are grounded in a wide body of relevant literature from other countries.

Defining lifelong learning and adult education

Confusions over terminology and definitions in the field of lifelong learning and adult education have a long history. As has been pointed out previously (Tobias, 1992, 1996), these confusions can be explained partly by noting that all definitions are contextual: they arise out of particular material and social conditions and serve specific social, cultural and political purposes within particular historical contexts.

In pre-capitalist, pre-colonial Aotearoa, there would have been no need to define or 'label' any specific sphere of human activities as 'adult education' or 'lifelong learning'. Within the whanau and hapu, there were undoubtedly highly significant institutionalised and non-institutionalised forms of learning and teaching, and people did continue to learn throughout their lives. Within the whanau, much of the learning would have been community-based (Walker, 1980) (Te Hau, 1972). From the mid-19th Century, however, with the gradual incorporation of Aotearoa/New Zealand into the rapidly expanding British imperialist political economy and its colonisation by successive waves of settlers drawn predominantly from Britain, a new hegemony was established.

This new hegemony served to preserve and extend the interests of British and colonial capital and the patriarchal cultural, social, political and economic institutions and traditions that the new settlers - the **tauiwi** - brought with them. Not surprisingly, this new hegemony was not established without a struggle. Military, political, economic and ideological means have been used to subdue or contain the forces of resistance over the past 150 years or so (Walker, 1990); and the forms and practices of learning and education as they exist in Aotearoa/New Zealand under late-capitalism in the first decade of the twenty-first century are a product of these struggles.

Not surprisingly therefore our understandings, interpretations and definitions of lifelong learning and adult education have also been shaped by these struggles. They are terms fraught with ambiguities (see for example Tight, 1996). The concept of 'education' is highly ambiguous, and its meaning has shifted historically. To call an activity 'educational' is to ascribe social value to it; and to say that someone is 'educated' or 'uneducated' implies a normative and evaluative judgment. However, the social values and the criteria underlying these judgments are not necessarily self-evident. They are in fact strongly influenced by wider

social forces and by the struggles of groups and movements to shape their destinies.

Raymond Williams (1983 pp 111-112) suggests that the original meaning of the term 'to educate' was 'to rear or bring up children' and that it was only in the late-18th Century that it came to be used in a more specialised sense to refer predominantly to 'organised teaching and instruction'. He points to the apparently curious fact that distinctions between the 'educated' and 'uneducated' were made increasingly commonly from the 19th Century onwards - from the very time when organised education and even universal education was beginning to be developed. He argues further that "There is a strong class sense in this use, and the level indicated by (the word) 'educated' has been continually adjusted to leave the majority of people who have received an education below it". Linda Sissons (1984 p 24) has argued that "education' and 'training' are not just words, they are political and economic tools." They serve ideological purposes.

If there are difficulties associated with the word 'education', the same is also true of the concept 'learning'. Stephen Yeo (1996) has argued that learning, unlike education, is an active and inclusive word, and hence is unconstrained by the notions attached to 'education'. Learning, like breathing, is something that everyone does all of the time, even if they do not realise they are doing it. It is a fundamental human process.

And yet, even the concept of 'learning' is not innocent: its use is shaped by ongoing historical struggles, with conflicting claims being made from time to time about the varying degrees of social importance of different forms of learning. Learning is closely linked with culture, and cultural traditions are not neutral. They embody values and relations of power. Moreover learning does not occur in a vacuum; it takes place in a variety of social contexts, and these vary in their degrees of formalisation and are shaped by various forms of social control. Indeed there are those (see for example Snook, 2001) who argue that to refer in a policy sense to learning rather than education is reductionist: it can have the effect of individualising and atomising highly complex social processes; it can also have the effect of masking the political and social basis of all forms of attitude formation and knowledge & skill acquisition, and denying the value-laden nature of all forms of learning and education.

As has been suggested above, forms of lifelong learning and adult education may be traced back many hundreds of years. Indeed, increasing awareness of the complexities of Neolithic settlements and the extraordinary achievements of humanity enables us to recognise the remarkable learning that must have been undertaken by some of those within these settlements. In spite of this, however, it is only over the past hundred years or so that lifelong learning and adult education have begun to be debated and promoted by some as instruments

of public policy. Moreover, it is effectively only since the early 1970s that debates over public policies on lifelong learning and adult education have begun to move to centre stage in many parts of the world.

This book is based on a broad interpretation of lifelong learning and adult education. Its scope is not limited to those forms of education and training provided by commonly recognised educational agencies and institutions. It includes formal, nonformal and informal education for adults. In addition, it includes ‘popular education’, which in Richard Johnson’s terms ‘... means starting from the problems, experiences and social position of excluded majorities, from the position of the working people, women and black people. It means recognizing the elements of realism in popular attitudes to schooling, including the rejection of schooling ... It means working up these lived experiences and insights until they fashion a real alternative’ (See Deem, 1993 p. 235). Although some chapters discuss the work of schools, polytechnics, universities, wananga, private education & training establishments, others look at the work of voluntary organisations, and the book as a whole is intended as a contribution to that tradition which questions the predominance of the ‘provider model’ of education.

Chapter 2¹

Discourses of lifelong learning and adult education - from the 1970s to the 1990s

Introduction

This chapter provides an overview of discourses of lifelong learning and adult education policies over the years between the early 1970s and the late 1990s. The first two sections provide a brief overview of international and local policy discourses in the 1970s and early 1980s. This is followed in the third and fourth sections by a more extensive discussion of changes in the 1980s and 1990s.

International trends in the 1970s and 1980s

In the latter part of the 1960s and early 1970s, major debates on educational policies were being undertaken under the auspices of a number of international organisations. These debates were prompted by a number of factors (See Gelpi, 1979; and M. Law, 1993; Lovett, Clarke, & Kilmurray, 1983; Sissons & Law, 1982). They included the continuation of the 'the cold war', de-colonisation, the expansion of multinational capitalism, changes in systems and methods of capitalist production associated with the increasingly varied applications of new technologies, the increasing power of the mass media, the development of the global economy and increasing internationalisation of the division of labour. They also included an increasing disillusionment, especially among political elites, with the welfare state compromises, which had been achieved in many capitalist countries in the 1930s and 1940s, and the rise of new social movements (Cooke & MacSween, 2000; Finger, 1989; Holford, 1995; M. R. Welton, 1993). Finally, they included increasing questioning of the possibility of solving problems of wealth and poverty, peace and war, or of achieving sustainability of the eco-system within existing political and economic settlements. All this was happening at a time of rapid expansion of formal educational provision in many parts of the world, increasing recognition of the limits of schooling in both rich and poor countries, and upheavals in universities. In the course of all this, fundamental questions were also being raised about the nature and purpose of education.

Within this context, UNESCO adopted *lifelong education* as its guiding principle (Dave, 1976; Lengrand, 1970). This became one of the main themes of the International Year of Education in 1970, and the report of its International Commission on the Development of Education was

¹ This and the next chapter and chapter 11 are based on a paper prepared for a Symposium on Lifelong Learning & the University in the 21st Century organised by the Centre for

based on this concept (Faure, 1972). One of the aims of UNESCO was to persuade governments to shift from an exclusive focus on policies to expand provision for formal schooling, and to examine educational alternatives from a wider lifelong perspective. At about the same time the Council of Europe adopted *education permanente* as its guiding principle in the field of educational and cultural policy. This notion shared much in common with UNESCO thinking; however, its main aim was to promote cultural democracy and the democratisation of culture (See, for example Council for Cultural Co-operation, 1971). The OECD was also reviewing educational policies at this time, and it too focused on the importance of lifelong learning. Drawing, however, on the Swedish experience it focused its attention on advocating strategies for post-compulsory education, which included alternating periods of study and work throughout life. This strategy was embodied in its central concept of *recurrent education* (Alanen, 1982; Kallen, 1979; OECD, 1973).

With the increasing pressures to expand and diversify post-compulsory education which took place from the early 1970s, new ways of conceptualising lifelong learning and adult education were required to re-shape policy and practice. One early approach which sought to expand and re-frame international thinking about education was that adopted in an influential report by a group chaired by Philip Coombs which was published in 1973 by the International Council for Educational Development (ICED). The central focus of this report was on policies for the education of rural children and young people in the third world, a high proportion of whom were missing out on education, as the governments of many impoverished countries poured most of their very limited educational resources into the establishment of formal educational institutions which could only serve an elite minority. This group took a broader view:

"In contrast to the view that equates education with schooling and measures it by years of exposure, ICED (the International Council for Educational Development) adopted from the outset a concept of education that equates it broadly with learning, regardless of where, when or how the learning occurs..."

"This learning-centred view of education obliges us to start our analysis with the clients and their needs before moving on to consider alternative means of meeting these needs. It obliges us also to recognise that education by its very nature is a continuing process, starting from earliest infancy through adulthood, that necessarily entails a variety of methods and sources of learning. We have found it useful to group these learning methods into three categories, recognising that there is overlap and a high degree of interaction between them: (1) informal education, (2) formal education, and (3) nonformal education."

"By informal education we mean the truly lifelong process whereby every individual acquires attitudes, values, skills and knowledge from daily experience and the educative influences and resources in his or her environment - from family and neighbours, from work and play, from the marketplace, the library and the mass media..."

"By formal education we refer, of course, to the hierarchically structured, chronologically graded 'educational system', running from primary school through the university and including, in addition to general academic studies, a variety of specialised programmes and institutions for full-time technical and professional training."

"...we define nonformal education as any organised educational activity outside the established formal system - whether operating separately or as an important feature of some broader activity - that is intended to serve identifiable learning clienteles and learning objectives ... It does not imply that the pedagogical methods used are necessarily unconventional. On the contrary, the methods used in nonformal programmes are sometimes just as stereotyped as those used in regular schools. And some formal schools, of course, use quite untraditional method." (Coombs, 1973 pp. 9-11).

The group argued that governments should look to the non-formal sector to meet the basic educational needs of large sectors of the population. In support of this argument it was suggested that formal educational systems were in many cases not well placed to provide relevant curricula and that they tended to be based on Western models which were inappropriate in many situations. This report was, however, not without its critics (See for example E. G. Torres & Others, 1974), some of whom argued that it sought to legitimate two forms of education - a formal educational system for the rich and a non-formal and cheaper system for the poor. Nevertheless, in spite of a continuing critique which has focused on the failure of non-formal education to contribute in any significant way to the reduction of social or educational inequalities, concepts employed in the report and in particular its advocacy of nonformal education have in fact been influential over the years.

The principles of lifelong education were, of course, very much broader than those enunciated by Coombs and the ICED (See for example Alanen, 1982; Dave, 1976). The principle themes addressed in a succession of UNESCO documents included: a commitment to a humanistic view of human nature; a belief that education can and should make a significant contribution to equality and democracy and to the solution of global problems; and a belief in the importance of flexibility and vertical and horizontal integration of the curriculum to achieve these wider ends (Faure, 1972). The UNESCO proposals were not without their critics from

both within the UNESCO organisation itself (Gelpi, 1979) and from outside it. They were seen by some to be utopian and insufficiently grounded in political, economic and social realities (Martin Carnoy, 1974; Vinokur, 1976), while others saw a danger of permanent schooling and increasing surveillance and bureaucratisation and greater political control of the curriculum of lifelong education (Frese, 1972; Ohliger, 1974).

As far as adult education was concerned, few of the ideas and ideals of lifelong learning and education were new. On the contrary, generations of adult educators had been working to achieve these aims, and at an international level the second world conference held in Montreal in 1960 had set lifelong education as a goal for future policies of governments. It argued: "Nothing less will suffice than that people everywhere should come to accept adult education as a normal, and that governments should treat it as a necessary, part of the educational provision of every country" (UNESCO, 1960 p. 9).

What was new was the increasingly widespread recognition by governments and other educators of the importance of lifelong education, recurrent education, and *education permanente*. This was demonstrated by the large number of government representatives and bureaucrats who attended the third UNESCO world conference on adult education held in Tokyo in 1972 (Lowe, 1983). By way of contrast, the previous world conference, held in Montreal in 1960, had been attended primarily by people who identified themselves as adult educators, drawn mainly from universities and from the voluntary sector.

This Tokyo conference, therefore, for the first time set adult education in the mainstream of educational thinking and planning internationally. This carried a number of major implications. In the first place, the necessity to provide opportunities for all adults to continue their learning throughout their lives was increasingly widely acknowledged.

The primary focus of the conference may be summed up in the following comments and recommendation:

"Experience shows that the provision of more education in most communities tends to favour most the already well educated; the educationally underprivileged have yet to claim their rights. Adult education is no exception to the rule, for these adults who most need education have been largely neglected - they are the forgotten people. Thus, the major task of adult education during the Second Development Decade of the United Nations is to seek out and serve these forgotten people" (UNESCO, 1972 p. 9).

Thus it was increasingly widely accepted by governments in the 1970s that a higher priority should be given to the provision of educational opportunities for young people and adults whose requirements and interests had not previously been served effectively by secondary and

tertiary educational institutions, or indeed by any existing education organisations.

Also new in the 1970s was an increasing acceptance of a definition of adult education which went far beyond the very much more restricted understandings of the 1950s and early 1960s. This was combined with recognition that the education of adults was necessarily closely linked with the wider structures of society. The Tokyo conference was followed four years later by a further large conference convened once again by UNESCO and held in Nairobi in 1976. This conference adopted a very broad definition of adult education:

"Adult education' denotes the entire body of organised educational processes, whatever the content, level and method, whether formal or otherwise, whether they prolong or replace initial education in schools, colleges, technical institutes and universities, whereby persons regarded as adult by the society to which they belong develop their abilities, enrich their knowledge, improve their technical or professional qualifications and bring about changes in their attitudes or behaviour in the two-fold perspective of full personal development and participation in balanced and independent social, economic and cultural development; adult education, however, must not be considered an entity in itself, but is a subdivision, and an integral part of, a global scheme for lifelong education and learning" (UNESCO, 1976).

The very wide range of recommendations, which arose out of this conference, were grounded in this broadened interpretation of adult and community education. It was argued that a variety of forms of adult education were necessary within the context of educational systems based on principles of lifelong education and that adult education had a number of key functions and roles to perform within the political economies of nations.

This very much broader understanding of adult education as part of lifelong learning was also noted at other international gatherings at the time. At an OECD conference (1977 p. 9), it was agreed that programmes fulfilling the following six functions could be identified:

- providing opportunities for remedial and basic education for adults;
- providing already well-educated adults with the opportunity to further their intellectual and cultural development;
- providing actual and potential working class leaders with the opportunity to further their education and develop leadership skills;
- providing occupationally related programmes for various occupational groups;
- providing programmes designed to promote effective citizenship; and
- providing programmes for the socialisation of immigrants.

Internationally, the 1970s then may be characterised as a period during which international

agencies sought to establish and promote the principles of lifelong learning and to work out policy implications for all educational sectors including adult education. In particular, the early- and mid-1970s saw an increasing sense of urgency concerning the need to provide for the educational needs of "the forgotten people". Adult education was widely seen as having a key role to perform in this.

Following the oil crisis of 1974, however a sustained period of economic growth in many industrialised countries came to an end. This was followed by a series of political defeats of social democratic reform governments, and the rise to power of conservative governments driven by revitalised neo-liberal economic doctrines. In many countries, the welfare state came under increasing attack on both equity and efficiency grounds, and the gaps between rich and poor both within countries and internationally continued to grow.

In the light of this, many of the progressive educational proposals and policies were either put on hold or refashioned to meet the new political and economic imperatives. The principles of lifelong education were reshaped in the 1980s to meet the requirements of the market place and the new 'enterprise culture'. This trend was further strengthened following the collapse of the communist regimes in the Soviet Union and Eastern Europe in the late-1980s.

A new vocationalism and credentialism came to dominate much of the thinking about educational policy. In times of high unemployment and increasing impoverishment and exploitation in many parts of the world, many of the demands for equity were re-shaped into either welfarist or narrow vocational, skills-focused responses. Social democratic imperatives for the development of education lost ground, as curricula around the world came increasingly to be organised around the short-term demands of rapidly changing and highly segmented labour markets, which in turn were shaped by the demands of post-Fordist systems of production and by the demands of multi-national capital. In the new 'enterprise culture', employers and private providers came to be seen by many governments as more cost-effective agencies of tertiary and adult education and training than traditional educational institutions. In addition, voluntary organisations and community groups engaged in lifelong education came to be viewed as agencies to receive state funding only to the extent that they served the narrowly proscribed welfarist or labour market requirements of the state.

Trends in Aotearoa in the 1970s and 1980s

Under the influence of the forces discussed above and the reorientation in international thinking about education, from the early 1970s philosophies of lifelong education and recurrent education began to influence developments in Aotearoa/New Zealand. This

movement gained considerable political momentum under the third labour government between 1972 and 1975 and was supported by the many thousands of people who participated in an Educational Development Conference, which was convened by the Minister of Education at that time.

A sustained critique was mounted on what was perceived as a narrow, university-dominated system of education and on the sharp policy and administrative divisions which existed between 'non-vocational' and 'vocational' education. In an attempt to break down these divisions, the concept of 'continuing education' was increasingly used to cover all forms of post-initial or post-compulsory education. In 1972, a Committee on Lifelong Education of the New Zealand National Commission for UNESCO recommended the adoption of the term 'continuing education'. This was defined as "... the education, both vocational and non-vocational, of those whose main occupational role is no longer that of a student." The committee thus saw continuing education in terms of post-initial education, and went on to state: "'Continuing education' has tended to supersede the older term 'adult education'. It is more precise, and includes more explicitly the education of those who have left school but are still minors, excluding only those who are undertaking further education before taking up a vocation" (Simmonds, 1972 p. 5).

Two years later, in 1974, the final report of the Educational Development Conference extended the definition of continuing education even further. It viewed continuing education in terms of post-full-time school education, and described it as: '... education provided for persons who are no longer full-time pupils within the primary and secondary school systems (and) thus encompasses all aspects of education after school, whether full-time, part-time, extramural, on-the-job, vocational or non-vocational' (Advisory Council on Educational Planning, 1974 p. 81).

The Labour government of the time acted on this and other recommendations arising from the Educational Development Conference, and in that same year brought to parliament a bill to amend the Education Act. In terms of the bill all the work of tertiary institutions including universities, teachers' colleges, technical institutes and community colleges as well as provision for part-time secondary school studies would have been brought within the field of continuing education. Following submissions at the committee stages, however, the bill was amended to exclude universities and teachers' colleges from its provisions. The final version of the Education Amendment Act of 1974 thus stated that: 'Continuing education' means education, including vocational education, provided for persons who are no longer required to attend school under the provisions of this Act, and who are not, unless expressly provided for by this Act, enrolled as pupils in any secondary school or department; but this does not include

education at a University or University College of Agriculture or Teachers' College' (New Zealand Government, 1974).

The new focus on lifelong education, viewed primarily in terms of the provision of a wider range of opportunities for post-compulsory education, resulted in the 1970s in a number of new initiatives. These included the establishment of a division of continuing education in the department of education, a rapid expansion in the number of technical institutes and a broadening of their roles, the establishment of a number of community colleges and schools-based Community Learning Centres, the establishment of thirteen Rural Education Activities Programmes, the Nelson Community Education Service, and the Wairarapa Community Action Programme, changes in legislation to allow for adults to return to school, provision for the direct funding of voluntary organisations by the department of education, the establishment of a number of Industry Training Boards under the Vocational Training Council, and the establishment of a number of pilot programmes and projects in Maori education, adult literacy, the use of radio in lifelong education, as well as in the appointment of a training and development officer by the National Council of Adult Education (J. C. Dakin, 1988; Garrett & Paterson, 1984).

By the late-1970s and early-1980s, however, a number of changes were taking place, which brought a halt to the progressive movement of a few years earlier, which had seen a broadening of the scope of lifelong education. As in many other capitalist countries, from the mid-1970s Aotearoa/New Zealand witnessed an increasing crisis of capital accumulation and a growth in unemployment. Among other things the populist national government under the premiership of Sir Robert Muldoon borrowed heavily to finance a series of 'Think Big' projects, whilst at the same time in the early 1980s instituting a wage/price freeze and cutting back on educational expenditure. These cuts, which were particularly severe in their effects on several adult education organisations such as the WEAs and the NCAE, together with other policies which sought to re-direct priorities within the polytechnics and community colleges to the provision of narrow skills-based labour market programmes, brought to a premature end the progressive, social democratic era in lifelong education initiated in the early 1970s.

Lifelong learning discourses and the reforms of tertiary education in the 1980s

With the election of the fourth labour government in 1984, there were great expectations among many progressive educators of a return to the era of the 1970s. There was widespread recognition that there was a great deal to be done. The manifesto of the incoming government brought lifelong learning back to centre-stage in public policy discourse. Within weeks of taking office the Minister of Education, Russell Marshall, gave the opening address at the

South Pacific Lifelong Learning Conference held in Wellington early in September 1984 under the auspices of the National Council of Adult Education (NCAE). At this conference, which was one of the largest gatherings of adult and community educators for some time, the Minister took the opportunity to state his belief in the importance of lifelong learning especially to achieve greater equity. He did however also sound a cautionary note, drawing delegates' attention to the inevitable scarcity of financial resources and stressing the need for coordination and cooperation among the agencies and groups involved (R. Marshall, 1984).

Following the conference the NCAE, with the approval of the Minister, established a Lifelong Learning Task Force, and in March 1985, he asked the Department of Education to convene a series of meetings or conferences of individuals and organisational representatives to examine a number of issues. Both the Task Force and this latter working conference produced reports, which were intended to move lifelong learning policies a step further. The focus of both reports was on equity issues (Lifelong Learning Task Force, 1985; Working Conference at Stella Maris Conference Centre, 1985).

A number of other groups were also appointed in 1984-85 to investigate various aspects of education. These included issues associated with transition education (Scott, Austin, & Mallard, 1984), the school curriculum (Committee to Review the Curriculum for Schools, 1987), the organisation and administration of polytechnics and community colleges with a view to establishing a Technical Institutes Grants Committee (Probine & Fargher, 1987), paid educational leave (M. Law, (Chair), 1985), and trade union education (M. Law, (Chair), 1987). The second report of this latter working party was particularly wide-ranging and relevant to public policy discourses on lifelong learning. It made a strong case for a public commitment by government to trade union education, arguing that it was vital to the economy. In addition, it drew on other discourses to argue that individuals should have the right to lifelong learning to enable them to play a full, active and democratic role in all spheres of economic, political, social and cultural life, including the workplace.

Linked with the work of some of these groups were several important new initiatives. These included the restoration of some of the state funding that the WEAs and other organisations had lost in the early 1980s, the recognition of paid educational leave for trades unionists, the setting up of the Trade Union Education Authority, the establishment of ACCESS courses for unemployed people, the provision of some equity funding in tertiary institutions, and some responses by the state to the pressures from Maori for recognition of their rights under the Treaty of Waitangi.

Nevertheless, the high expectations of the mid-1980s were never fulfilled. Elsewhere (Tobias,

1990a) I have discussed the reasons for this in some depth. Briefly, however, the failure was in part at least a direct consequence of the rapid rise to political dominance of neo-liberal ideologues. They argued strongly for lower levels of taxation, a substantial reduction in the role of the state in the provision of education and other social services, and much greater reliance on the market place and on market signals in the determination of policy. Within these frameworks the long-established linkages between education, citizenship and the state were largely severed, and replaced by linkages between education, the consumer and the labour market.

From 1987 on a number of further review groups and policy groups were presenting their reports. These included the reports of the Interim Advisory Group on Nonformal Education (Shallcrass, 1987), the Universities Review Committee (New Zealand Universities Review Committee, 1987), and the Review Team (Tertiary Review Team, 1988). The reform process, initiated on a wave of progressive enthusiasm in 1984, had to a greater or lesser extent been captured by the dominant neo-liberal ideology. Each review or policy group and each cabinet decision can usefully be seen to constitute a moment in the struggle between the forces of neo-liberalism and those of progressivism. As in many other countries, this resulted in many instances in the rise of a new managerialism, instrumentalism, vocationalism and credentialism.

In May 1988 the report of the Taskforce on Education Administration was published (Picot, 1988). It has been argued (McCulloch, 1990) that this report reflects and reconciles the criticisms and views of both neoliberals on the right and progressives on the left. Both of these perspectives had drawn attention to the failures of traditional educational structures and institutions to provide the kind of education required to achieve equity and responsiveness as well as accountability and efficiency. The Taskforce argued that the central problem was the over-centralised and overly complex administrative structure, and the consequent lack of effective management practices and lack of information required by people in all parts of the system to make informed decisions. The problem was thus defined in neoliberal terms as essentially a managerial rather than a professional or political one, and the Taskforce went on to advocate a managerial solution. Its solutions included the separation of the functions of:

- policy advice and implementation (which should be located in a newly created Ministry of Education),
- the provision of education (which should be located in institutions, which should have elected boards of trustees and charters to ensure maximum accountability),
- the provision of professional and administrative services (which should for the most part be privatised and purchased on the open market by institutions out of funds allocated by the state), and

- the review and audit function (which would be located in a separate and independent state agency).

Following a three-month period of public discussion of the Taskforce's recommendations, in August 1988 the government set out its policy position in a document entitled *Tomorrow's Schools* (Lange, 1988). In general terms the government accepted the recommendations of the report, modifying them in some respects by retaining more of the professional service functions within the state and providing for somewhat greater recognition of the role of professional educators in the development of national educational policies.

By March 1988, the government had received reports from groups reviewing every aspect of post-school education. All these reports, as well as the report of the Royal Commission on Social Policy which was published in April 1988 (Richardson, 1988), were referred to a Working Group, and its report was published on 31 July 1988 (Hawke, 1988) and distributed widely for public discussion. This report was wide-ranging. Among other things, it emphasised the importance of lifelong learning, endorsed a very broad interpretation of education and drew on some of the managerialist thinking contained in the Picot Report to recommend in the tertiary sector as well greater reliance on institutional decision-making and a more limited role for central agencies.

After six months of debate and discussion of the recommendations of the Hawke report, in February 1989 the government issued *'Learning for Life: One'* (Minister and Associate Minister of Education, 1989). This was followed six months later in August 1989 with a further document *'Learning for Life: Two - Education and Training beyond the Age of Fifteen'* (Minister of Education, 1989). These two documents announced the decisions, which had been made by government. In his introduction to the first of these documents, Phil Goff, then Associate Minister of Education, drew on the discourse of lifelong learning and lifelong education. He said that:

'Rapid change is a feature of the modern world. Technology, the changing structure of the economy and the increasing complexity of modern society require people today to possess higher levels of skill and to be more adaptable. Not only must young people spend longer in their initial training and education - increasingly, education and retraining will become a recurrent feature of our lives. Education is becoming a truly life-long process, necessary for us in taking our places both in the workforce and wider society' (p iii).

The decisions announced by the government included endorsement of many of the recommendations of the Hawke working group. They provided the basic framework on which

the Education Amendment Act of 1990 rests, and it was through this major piece of legislation that the government brought about its major re-structuring of post-compulsory education. The Act provided for the following:

- abolition of the University Grants Committee and the establishment of a common system of management, administration and funding of all tertiary institutions on the basis of charters, using an Equivalent Full-Time Student (EFTS) formula;
- endorsement of the universities' role as 'critic and conscience of society';
- abolition of the Vocational Training Council (VTC), but the retention of its Industry Training Boards;
- abolition of the National Council of Adult Education (NCAE), a statutory body, and the transfer of its assets to the National Resource Centre For Adult Education and Community Learning (NRC), an independent Trust;
- establishment of the Education & Training Support Agency (ETSA);
- abolition of the Vocational Guidance Service and its replacement by Career Development and Transition Education Service;
- abolition of the Trades Certification Board (TCB) and the Authority for Advanced Vocational Awards (AAVA) and their replacement by the NZ Qualifications Authority (NZQA) with wide powers to establish a new qualifications framework;
- abolition of the University Grants Committee (UGC), and recognition of the Vice-Chancellor's Committee to work alongside NZQA in the university sector; and
- establishment of mechanisms for the registration and accreditation of private training establishments.

Overall, this legislation established the framework within which the tertiary sector was to develop over the following years. Its main features included the fact that it was to be driven largely by student enrolments and by institutional decisions based on assessments of potential student interests. There was to be little to distinguish or differentiate between the various types of institutions at least in terms of funding, and each institution was to be largely self-determining within the confines of charters and corporate plans which would be negotiated with the ministry of education. Polytechnics and Colleges of Education generally reacted positively to legislation which gave them far greater autonomy than they had ever previously enjoyed. Universities on the other hand reacted far more ambivalently to the abolition of the UGC and the prospect of greater competition with other tertiary institutions. Voluntary organisations were also critical since the Act failed to provide a satisfactory mechanism for the recognition and funding of voluntary organisations engaged in adult and community education. In addition, it seems that the envisaged reforms of work-based education and training were not complete in time to be incorporated fully in this legislation.

The legislation may then be seen as one outcome in a series of struggles between the competing ideological and political forces referred to above. From the point of view of lifelong learning discourses, it may be argued that it reflected a compromise. On the one hand, it went some way toward breaking down institutional barriers to learning and allowed for the possibility of a more diverse curriculum; on the other hand, it endorsed a highly individualised and consumerist notion of lifelong learning and a managerialist approach to problem solving. It appeared to allow little space for the development of radical or critical educational engagements based on the collective interests of groups and movements in society.

Lifelong learning discourses in the 1990s

In November 1990, six months after the passage of the Education Amendment Act, a National government was elected to office on the promise of a 'decent society', and on a tide of voter disenchantment with a Labour Government, which had all but destroyed the welfare state compromise. In December 1990, however, one of the first initiatives of the new government was to produce an 'Economic and Social Statement' which announced massive cuts in welfare benefits and housing assistance. This was followed in 1991 with a whole series of measures designed to cut back radically on the provisions of the welfare state.

In mid-1991 the government announced its new education policies as part of its first budget and within the context of a very strong commitment by government to neo-liberal ideology along with a view which suggested that New Zealand's economic ills derived from past protectionist policies and limitations and skill deficits in the labour market. Policies thus included a wide range of measures. The standard tuition fee for tertiary studies was to be abolished and instead individual tertiary institutions were to be required to set their own fees. 'Study Right', a mechanism which enabled the state to fund different categories of tertiary students at different rates and progressively to reduce the level of funding of older students, was to be established. Cuts were announced in student allowances to bring them into line with the unemployment benefit, and the iniquitous student loan scheme was introduced. A capital charge on the assets of tertiary institutions was also proposed, and cuts were announced in the funding of NZQA, the Career Development and Transition Education Service, ETSA and a wide range of community groups. It was also announced that all state funding of the WEAs would be withdrawn.

The introduction of a new Industry Skills Training Strategy was announced in 1991 and the new measures were set in place through the Industry Training Act, which came into law in June 1992. They included the progressive replacement of Access by Training Opportunity Programme (TOP) – a more highly targeted and restricted training programme for unemployed

people with few qualifications. They also included the establishment of a Youth Traineeship Scheme, and the consolidation of other funds for training, apprenticeships, etc. to be available on a contestable basis to the new Industry Training Organisations (ITOs) which were to be brought into existence. These ITOs, funded partly by government and partly by industry, were recognised by ETSA and replaced the previous tripartite Industry Training Boards. The ITOs, which were seen as key agencies to develop industry-led training, were to operate their own programmes leading to competency-based qualifications approved by NZQA as well as encouraging and supporting other forms of training within their industries.

In 1991, the NZQA adopted its new qualifications framework. This was designed to provide for the development of a flexible, modularised competency-based system education and training, in which all education and training would lead to nationally recognised qualifications. In February 1993, the first units of the new qualifications framework were launched. In the meantime, in 1992, the government passed the Union Representatives Education Leave Act Repeal Act. This Act provided for the disestablishment of TUEA and the withdrawal of the right of union representatives to paid educational leave. This legislation was put in place in spite of evidence to indicate the considerable success of the Trade Union Education Authority (TUEA) in providing useful education and training for many people who had had little if any positive prior experience of education,

Many of the measures adopted by government in the early-1990s were grounded in discourses opposed, or unsympathetic, to any involvement by the state in lifelong learning. An indication of the limited scope of the predominant thinking at the time, is provided by the fact that the only major policy work which had lifelong learning and adult education as a central focus, was done through a project established by the Ministry of Education in mid-1992 under the initial title, 'Return Education and Training Policy Project'. Although this project was subsequently renamed the 'Adult Education Policy Project', its scope remained limited. Moreover, little consultation was undertaken, and no final report was ever published (Sutton & Benseman, 1996 p. 136).

Few references in public policy discourse at the time were made to lifelong learning, and little recognition was given to the potential significance of a range of lifelong learning and adult education initiatives. Policy, it would seem, was driven firstly by neo-liberal ideologues who saw no need to participate in such discourses, and who saw tertiary education largely as a private good, and secondly by conservatives, many of whom rejected the priorities advocated by supporters of lifelong learning.

In spite of this, by mid-1993 - perhaps driven in part by the upcoming general elections -

Lockwood Smith as Minister of Education initiated a public consultation on all aspects of education. To this end, a draft document entitled 'Education for the 21st Century' was published and widely distributed. This document was intended to stimulate discussion of policies on education from the cradle into adulthood. In his foreword the Minister says that: 'Contained in the Document is the Government's vision of an education system that will provide, first, the foundations of education, second, the development of essential skills, and third, lifelong learning' (Ministry of Education, 1993). However, the notion of lifelong learning contained in the document is almost exclusively limited to formal learning provided for under the qualifications framework. There is little if any recognition of wider notions of lifelong learning.

Early in 1994, following four months or more of extensive discussion the government published a revised version of the strategic document on 'Education for the 21st Century'. The introduction to this document begins by pointing to the rapid pace of technological change and the 'explosive growth in communications'. It argues that 'New Zealand must compete in the global marketplace' and that 'success will depend in large measure on the investment we make in education and training'. At the same time it argues that 'All New Zealanders have a right to education and the benefits it brings', and hence seeks to guarantee or ensure access to appropriate and high-quality educational opportunities to all. The document, it claims, 'outlines a life-long education system which lays strong foundations in the early childhood years and continues to build on these during the years of compulsory schooling. It envisages a seamless education system in which barriers no longer exist between schools and post-school education and training.' Finally, the report claims that it 'outlines the vision of a seamless education system which can maximise participation and achievement in education and training, from birth throughout life' (Ministry of Education, 1994 p. 6).

In spite of these claims, which do engage with discourses on lifelong learning, the vision remains limited, constrained by the requirements of the qualifications framework on the one hand and the labour market on the other. It was also limited by the dominance of neoliberal ideologies which rejected significant state intervention and provision and instead espoused market-driven models of post-compulsory education. The report as a whole focuses primarily on (a) forms of initial and preparatory education i.e. a front-end model of education rather than a lifelong learning one, and (b) work-related skill development in the adult years. The concrete proposals contained in the report provide little evidence of understanding of or sympathy for those wider lifelong learning goals focus on the integration of personal, social and democratic ends, and few significant changes are referred to.

Over the following three or four years New Zealand continued to experience considerable

expansion of its formal tertiary education sector. This was based primarily on the earlier changes set in place by the reforms initiated by the 1990 legislation. At the same time, the nonformal sector languished. Then in September 1997 a further review of tertiary education was launched by the new National/New Zealand First coalition government. A Green Paper was released to provide a basis for public discussion and consultation (Ministry of Education, 1997b). In its discussion of the role of tertiary education, the Green Paper notes that 'Tertiary education occurs in a variety of settings, in many different ways'. In line with the thinking of Treasury, it points out that tertiary education 'provides many benefits to students'. However, it also states that employers and the wider community benefit. 'Tertiary education contributes to achieving the Government's wider social goals and a highly skilled and high-growth economy'. To do this effectively, it argues, a tertiary sector is required that is 'dynamic and adaptable'. 'It must have providers that are committed to encouraging lifelong learning and to the pursuit of equality' (p. 7).

This need for a lifelong learning focus is repeated in the discussion of the goals of tertiary education. Emphasis is placed on maintaining flexibility in teaching and learning and a commitment to high standards, along with supporting individuals to achieve their highest potential, encouraging increasing numbers of participants from those groups that have traditionally been under-represented in the tertiary sector, encouraging responsiveness and innovation, and setting in place stable and predictable resourcing arrangements are all seen as important goals (p. 8). In this Green Paper it was noted that overall enrolments in tertiary education had increased by 30% between 1991 and 1997, with Maori enrolment increasing by 103% and that of Pacific peoples by 116%. It was also noted that total expenditure by the state on tertiary education 'including tuition subsidies, loans and allowances' had increased by a little over 30% between 1992/3 and 1996/7 (p. 9). In spite of these increases, what was not noted in the Green Paper was that the per student funding by the state had fallen steadily between 1991 and 1997 by close on 12% (Ministry of Education / Te Tahuhu o te Matauranga, 2000 p. 104), that funding of nonformal education had been cut drastically, and that the difficulties of sustaining high levels of state support were exacerbated by a tax regime which had been driven down by neo-liberal forces in the name of global competitiveness.

Some of the government's decisions on the funding of tertiary education arising out of this review were announced in the 1998 Budget. This was followed in September of that year by the publication of a White Paper outlining further decisions (Ministry of Education, 1998). These served for the most part to confirm and/or implement the recommendations, which had been contained in the Green Paper. In his foreword Wyatt Creech, Minister of Education, drew to some extent on lifelong learning discourses and in particular on those elements which emphasised the needs of the labour market and the constant need/pressure on people to retrain

or up skill or change direction throughout their lives. Although the government considered that tertiary education should contribute in important ways to a range of goals, its primary focus was on lifelong learning for employment. This employment focus was, however, to be achieved, not through processes of co-ordination or planning but primarily by opening tertiary education up to the competitive demands of the marketplace. The tertiary system was to be made more responsive to the demands of individual learners and potential learners. Tertiary education was to be traded in much the same way as any other commodity. On the other hand, the government did recognise that it had a number of roles:

- Firstly, it had to ensure that the resources of the state were equitably distributed between public and private institutions with the only two criteria being those associated with student or consumer demand and those associated with course approval (it had to eliminate ‘distortions’ created by previous preferences given to public institutions);
- Secondly, it had to ensure that potential consumers or learners received the fullest possible information so that they could make informed choices and decisions;
- Thirdly it had to ensure more effective quality assurance;
- Fourthly, it had to ensure greater efficiency and accountability especially in the governance of public education institutions (this was to be achieved by imposing corporate instead of collegial structures on these institutions);
- Finally, it had to bring about greater contestability and transparency in the allocation or research funds both within the tertiary sector and outside it.

As has already been suggested, this White Paper and these decisions by government do not seem to have been much influenced by the lifelong learning discourses which had emerged in many other OECD countries at the time (Istance, Schuetze, & Schuller, 2002; OECD, 1996). In most respects these decisions served to implement the neo-liberal policies which had played such a key role in policy formation since the mid-1980s - policies which had very little to do with lifelong learning.

Conclusion

This chapter has taken us on an historical excursion into the discourses of lifelong learning and adult education. It has examined the place of lifelong education and lifelong learning in public policy discourses over the past thirty years or so. The main focus has been on the politics of lifelong learning in Aotearoa New Zealand, as successive governments have adopted very different policies. Reference has, however, also been made to international developments, with particular reference to agencies such as UNESCO and the OECD. Discourses of lifelong learning came to the fore in the 1970s. They then retreated in the late-

1970s and early 1980s - an era of populist conservatism. The mid-1980s and the election of a Labour government saw their revival. However, almost from the outset, this revival was challenged by the re-birth of powerful forms of neoliberalism promoting globalisation. The struggle between progressive and neoliberal discourses on lifelong learning and adult education dominated the late-1980s, and this lent support to the emergence of economic rationalist and managerialist public policy discourses. The election of a National government in 1990 saw a victory for conservatism and neoliberalism and the defeat of advocates of progressive forms of lifelong learning and adult education as public policy goals.

The chapter commenced by looking at the dominance of progressive policies of lifelong learning and adult education in the 1970s. It then described a radical shift in political climate in the 1980s and early-1990s - a period during which neoliberal economic policies and human capital theories of education came to dominance. It described a time when investment by the state in education and especially in post-compulsory education came to be questioned by governments around the world, as they sought to remove themselves from the direct provision of all forms of services including education. Progressive and socialist traditions of education were under attack around the world and nowhere more so than in Aotearoa New Zealand.

The next chapter picks up the story and describes events following the election of a Labour-led Government at the General Election in 1999. It examines among other things whether or not the left and centre-left were sufficiently strong, perceptive and astute to revive these progressive and socialist traditions of lifelong learning and adult education

Chapter 3

Discourses of lifelong learning and adult education -

2000 to 2002

Introduction

This chapter picks up the story from chapter 2 and discusses the discourses of lifelong learning and adult education policies which have emerged in the early years of this century. The first section provides a brief description of Labour Party policy discourses prior to their election to Government with the Alliance in 1999. This is followed by discussions of the discourses evident in a variety of policy documents during 2000 and 2001, leading up in the final section to a brief description of the decisions and the implementation process in 2002.

The election of the Labour/Alliance Government in 1999

In the lead-up to the general election of 1999, the Labour Party issued a wide range of policy documents. In these documents (See for example New Zealand Labour Party, 1999a; 1999b) the Party emphasised that tertiary education should be seen not as a market-driven 'private good' but as a central mechanism of public policy and hence as a 'public good'. It argued that:

'Public investment in tertiary education and research is one of the most powerful tools available to promote the kind of social and economic development New Zealand needs to face the challenges of the 21st Century' (New Zealand Labour Party, 1999a p.1).

It called therefore for a shift from the competitive market-driven tertiary education policies which had dominated much of the previous government's thinking, as well as the thinking which had come to dominate the later years of the previous labour administration in the 1980s. Instead, it advocated a more collaborative approach to the provision of education. With regard to adult and community education, it noted that the 5th International Conference on Adult Education, which had met in Hamburg in July 1997 under the auspices of UNESCO, had called for 'a renewed vision of education in which learning becomes truly lifelong' (UNESCO, 1997). In the light of this, it claimed that its policy was 'built on a recognition of the crucial role of education in relation to social investment, lifelong learning and nation building' (New Zealand Labour Party, 1999b p. 2). Moreover, it also claimed that in 1994 Labour had appointed the first ever Spokesperson for adult education and community learning, and in 1996 had gone to the election with the first comprehensive policy for adult education and community learning. In relation to adult and community education, Labour argued that:

within this sector, it is crucial to define, recognise and resource key learning pathways and networks, both inside and outside of the Qualifications Framework and to build effective partnerships between providers (New Zealand Labour Party, 1999b p. 2)

It then went on to detail a wide range of policy initiatives which would demonstrate its commitment to formally recognising and supporting this sector. In addition to this high level of support from Labour, the Alliance also made clear its commitment to adult education and community learning.

At the general election in November 1999, a Labour/Alliance government was elected to office, and in the following months the new Labour-led government initiated a number of measures intended to fulfil its pre-election promises. These included the reform of the apprenticeship system, reviews of industry training and adult and community education, and moves to set in place an adult literacy strategy. In addition, it established a Tertiary Education Advisory Commission (TEAC) to review all aspects of tertiary education. Each of these measures was seen by the government as making a potential contribution to the promotion of lifelong learning and what came to be called a 'knowledge society'.

'Modern apprenticeship' and industry training policy

Early in 2000 attention was given to the re-establishment of the apprenticeship system, which had all but died over the previous fifteen years. It was however an apprenticeship system with some differences. The long-standing assumption underlying the previous system had been that apprenticeships should be based primarily on 'time served'. An apprentice was required to complete a specified number of hours (generally between 8,000 and 10,000 hours or five years depending on the trade) of on-the-job and off-the-job training in order to qualify as a tradesperson. Moreover, this was monitored by the Department of Labour which kept a record of the progress of each apprentice including their achievement in the workplace and in relevant examinations. Prior to 1984, government departments, including the railways, the post office and the Ministry of Works, had been responsible for training apprentices in a wide range of trades, and many private sector employers depended on these departments for the supply of trained tradespeople. As suggested above, this system was a casualty of the neoliberal reforms of the 1980s and early 1990s since these had involved deregulation, corporatisation and privatisation and the consequent shrinking and rationalisation of the public sector. The number of apprenticeships fell away from 25,000 in 1980 to 15,000 in 1990, and in 1992 the Apprenticeship Act was repealed altogether. As indicated earlier, in place of apprenticeships ITOs developed industry-specific training and registered a very large number of unit standards on the New Zealand Qualifications Framework. The total number of trainees participating in industry training therefore grew from 18,344 in 1995 to 49,577 in 1999 and 66,225 in 2001 (See Skill New Zealand Pukenga Aotearoa, 2001; 2002). On the other hand, there was little if any recovery in the number of people undertaking the kind of systematic and extensive training which had previously been embodied in the notion of apprenticeship.

Accordingly, in April 2000 the new Government launched its 'Modern Apprenticeship' scheme, and in December of that year Parliament enacted the Modern Apprenticeship Training Act. This scheme was intended to revitalise the development of skilled tradespeople by providing an attractive 'brand new vocational education and training opportunity' for young people. It was based on the training systems which had been developed by the growing number of ITOs and by the NZQA with the support of Skill New Zealand since 1992. It was therefore intended to be 'industry-led', and combine on- and off-the-job training. It was based on training which led to unit standards and to qualifications registered on the Qualifications Framework and hence was recognised nationally. However it was also intended to offer something more. In particular, it sought to revive notions of partnership which were seen to have been a feature of apprenticeships in the past, partnerships between government, employers, associations of employees or trade unions, and the apprentices themselves. The scheme was intended to provide systematic, high quality workplace learning in an increasingly wide range of industries and occupations. It was targeted primarily at 16-21 year-olds, and was based on a training agreement and an individualised training plan, signed off by both the employer and the apprentice. It covered both industry-specific and generic or 'key' skills which included literacy, numeracy, communication and study skills; and it complemented existing tertiary education and industry training options. It was envisaged that government would provide additional resources and a key aspect of the scheme involved the appointment of co-ordinators in each industry to provide encouragement, guidance, information and support for apprentices and employers.

In 2000 the Government also initiated a wide-ranging review of all aspects of industry training. This review, undertaken by a group of officials and policy-analysts in the Department of Labour, Ministry of Education and Skill New Zealand, began by highlighting changes in the New Zealand economy and society which it considered might lead to changes or extensions to industry training. These included:

- rapidly changing skill requirements in the workplace arising primarily out of changes in technology and workplace organisation,
- the growing diversity of the labour force leading to diversity of training needs,
- the growing importance of education for the economy,
- disadvantages faced by Maori and Pacific people in the workplace,
- the high proportion of small firms in the New Zealand economy with 42% of all workers being in firms with fewer than 20 employees, and
- rising international migration and trade and the effects of globalisation on qualifications and skill recognition (Department of Labour and the Ministry of Education in conjunction with Skill New Zealand, 2000).

The group then looked at the key features of the then existing training strategy, and held a series of consultative meetings with ITOs, employers, unions and Maori groups. It endorsed a number of existing features and made a number of recommendations. Then in March 2001, the Government released a discussion document (Office of the Associate Minister of Education (Tertiary Education), 2001c), and invited public submissions relating to the industry training system and its future shape, funding, focus and priorities. Following this, in August 2001, the Government announced a number of decisions which had arisen out of the review (Office of the Associate Minister of Education (Tertiary Education), 2001b). These included decisions to:

- give greater discretion to both employers and employees to determine which ITO/s they wished to join;
- strengthen ITOs and give them a greater leadership role in planning to meet future human resource development needs,
- require Skill New Zealand to promote co-operation between or amalgamation of ITOs where this would result in improved services, and to work actively with firms and trade unions in industries without ITO coverage with a view to either forming new ITOs or including these industries within the coverage of existing ITOs, and
- make provision for increased government and industry funding for ITO initiatives and increased government funding for strategically driven industry training, including provision to assist with training in small and medium-sized firms.

‘Youth Training’ and ‘Training Opportunities’

At the same time, in August 2001, the Government initiated a review of the Training Opportunities (TOP) and Youth Training (YTP) programmes. The predecessor of these programmes was the ACCESS programme established by the Labour Government in the mid-1980s in response to rising levels of long-term unemployment. It was primarily intended for those who were disadvantaged in the labour market. Entry to the programme was, however, open, with the level of state funding for each trainee being related to the level of disadvantage they faced. MACCESS (Māori ACCESS) ran alongside the general programmes and was administered separately by Māori authorities (MACCESS Authorities). It focused specifically on Māori, and was delivered mainly by Māori providers.

In the early-1990s the National Government looked to increase the efficiency of the programme in achieving the employment outcomes required by Government. Accordingly, at the start of 1993, the Training Opportunities Programme (TOP) was set up in place of ACCESS, and later that year MACCESS was subsumed into TOP. Though TOP retained some of the features of ACCESS, it was targeted more specifically at school leavers and long-term

job seekers with limited qualifications. It aimed to assist them to obtain employment or to move into further education and training.

Until 1998, TOP was funded through Vote Education and was administered by Skill New Zealand (formerly known as Education and Training Support Agency). On 1 July 1998, the programme was divided in two: Youth Training and Training Opportunities. At that time, \$24million was allocated from Training Opportunities to the Department of Work and Income (DWI), now the Ministry of Social Development (MSD) for work related training and other assistance initiatives. At the time of the Review, Training Opportunities was being administered by Skill New Zealand under contract to the MSD and funded through Vote Work and Income. Youth Training was administered by Skill New Zealand, but funded through Vote Education. Eligibility for the programmes was divided by age: Youth Training catered to 16 and 17 year olds (and 15 year olds with school exemptions), Training Opportunities was for those aged 18 and over.

As mentioned above, these programmes, both of which provided state-funded full-time education/training, were driven primarily by the demands of the labour market. Thus, Youth Training was seen as providing a bridge for school leavers with ‘low or no qualifications, and Training Opportunities continued to be targeted at ‘those most disadvantaged in the labour market’, particularly long-term unemployed people, domestic purposes beneficiaries and Workbridge clients. However increasing efforts were made to ensure that participants in the programmes were able to gain credits towards nationally recognised qualifications registered on the Qualifications Framework. In December 2001 the review team released a discussion document (Training Opportunities and Youth Training Review Team, 2001), and then in May 2002 the final report of the review group was published. This included announcements of relevant government decisions (Office of the Associate Minister of Education (Tertiary Education), 2002c). The Review Team drew on the work of TEAC and generally endorsed its recommendations. It laid emphasis on the ongoing

‘... need for quality learning programmes that assist learners with low qualifications who face significant barriers in the labour market to acquire the foundation skills they need to sustain themselves in employment, to continue to learn over the course of their lives, and to participate in society to the fullest extent’ (p. 12).

Government endorsed this statement of the review team and indicated that it had been decided that the future focus of the programmes should be on learners acquiring ‘a critical bundle of foundation skills’ to enable them to move effectively into sustainable employment and/or higher levels of tertiary education. Considerable emphasis was thus placed both here and in other documents on the importance of ‘foundation skills’. However it was also acknowledged that more work needed to be

done by the proposed Tertiary Education Commission and by the Ministry of Education on clarifying the nature of 'Foundation Skills'. It was also stressed that

- programme delivery should be flexible, learner-centred and geared to the requirements of the labour market;
- programmes should be more fully integrated with the whole range of educational opportunities and employment assistance schemes available; and
- programmes should continue to be responsive to the needs and aspirations of Maori learners.

It was also noted that the focus on foundation skills and sustainable employment echoed other Government strategies, including the *Tertiary Education Strategy 2002-07* and the *Employment Strategy*.

The adult literacy strategy

In the meantime, in May 2001, the government released another key document in relation to discourses of lifelong learning. *More than Words / Kei tua atu I te kupu* (Office of the Minister of Education, 2001) was the first document in New Zealand's educational history to set out an official adult literacy strategy. For its definition the document draws on the broad definition put forward by Workbase, the National Centre for Workplace Literacy and Language. Literacy is thus defined as 'a complex web of reading, writing, speaking, listening, problem solving, creative thinking and numeracy skills' (p 4). In this way the document acknowledges for example that print literacy is but one part of a wider understanding of what it means to be literate. The document identifies four key principles which underlie the strategy:

- 'First, the focus must be on achieving literacy gains for learners as quickly as possible...'
- Secondly, 'adult literacy teaching must be learner-focused, challenging and outcome-focused, using individuals' own goals as a focus for learning but not so demanding that learners become afraid of failure and leave'.
- 'Third, programme development will be informed by best practice through good evaluation and research'.
- 'Finally, provision must be culturally appropriate for the wide diversity of learners, especially Maori and Pacific peoples, and other ethnicities from non-English speaking backgrounds' (p 6).

While stressing the importance at all times of building on what has already been achieved, it then goes on to identify the following three key long-term goals of the strategy:

- Increasing the number and variety of adult literacy learning opportunities and options (including opportunities for substantial periods of intensive tuition), and

making these opportunities freely available and readily accessible,

- Developing the capability of those who are or might be involved in adult literacy teaching by ensuring high quality education and training and support, along with incentives to attract and retain skilled teachers, relevant qualifications, quality teaching resources, etc., and
- Improving systems of quality assurance to ensure that adult literacy teaching programmes and learning environments in New Zealand are world class.

It then concludes by emphasising the interrelationships between adult literacy and other aspects of tertiary, adult and community education and workplace learning, and by stating that the government, through the Ministry of Education, will provide overall direction and planning, and will co-ordinate the development of standards and best practice models. It also makes it clear that the 'long-term strategy is to develop high quality adult literacy education supported by a funding system supporting quality provision, which can achieve measurable literacy gains for learners' (p 20).

Adult and community education

Those involved in adult and community education (ACE) had hoped that the Government would move quickly to review the field. However it was not until August 2000 that a Working Party was established to provide Government with advice on a new policy and a funding framework for the field. By way of contrast with the other reviews referred to above which were undertaken by groups of officials and policy advisers, the Associate Minister of Education appointed a Working Party consisting of thirteen people drawn from a variety of sectors of the field, to undertake the review of adult and community education. The task faced by this diverse group of people was a daunting one. It was faced with a number of difficult issues which had arisen out of the dominance of neo-liberal ideologies and the commitment to credentialism over the previous decade. One consequence of this was that the period had been characterised by an almost complete lack of interest in non-credentialed forms of ACE on the part of successive governments. This had resulted in a lack of any policy framework within which ACE might be located and hence a lack of recognition and support by policy analysts and key people in the Ministry of Education, and serious underfunding of the many voluntary organisations and groups working in ACE. This had had the effect of marginalising the field as a whole, and especially those involved in learning and education in voluntary organisations and social movements.

Faced with this large-scale neglect of the sector as a whole over an extended period, and in particular the lack of support for those forms of ACE located outside of educational

institutions, the Working Party consulted widely. It also seems to have drawn on some of the thinking contained in a number of reports from the late-1980s and early 1990s (Hartley, 1989; C. M. Herbert, (Chair), 1990; Lifelong Learning Task Force, 1985; and Shallcrass, 1987), as well as being influenced by some of the thinking being done by TEAC and having some influence on TEAC's thinking. In July 2001 the report of the group was published, and two months later in September, it was released by Government (Adult Education & Community Learning Working Party, 2001).

The report defines ACE in the following broad terms:

Adult and Community Education (ACE) is a process whereby adults choose to engage in a range of educational activities within the community. The practice fosters individual and group learning which promotes empowerment, equity, active citizenship, critical and social awareness and sustainable development. In Aotearoa New Zealand, ACE is based upon the unique relationships reflected in Te Tiriti o Waitangi (p 10).

It then goes on to describe what it considers are some of the key features or attributes of adult and community education.

ACE occurs alongside the formal education system and is therefore accessible to all. It promotes a culture of lifelong learning. It happens in a wide range of contexts in both structured and spontaneous forms, all of which have their own value. There is joy in learning. It may be initiated by individual and group needs which encourage adults to learn to understand their world and to seek change within it.

The nature of ACE makes it well suited to deliver effective programmes in: adult literacy and numeracy provision, English language and social support programmes for speakers of other languages, personal development education, learning for whanau/hapu/iwi development; cultural retention, revitalization of Maori language and culture; education to facilitate group and community development; (and) education for social and environmental justice (p 10).

This description, which draws so clearly on progressive discourses on lifelong learning, serves to emphasise both the idealism which underpins much thinking about the nature of the field and the breadth of its contribution to wider goals. The group thus devotes considerable attention to the task of legitimating the diverse roles and potential roles of adult education and community learning. In doing this, it also draws on a number of documents published by UNESCO, the OECD and other international organisations, identifies a range of public and private benefits of ACE, and points to the large enrolments in a variety of ACE programmes. It then proceeds to highlight the roles of ACE in providing education for those with the

greatest need, contributing to the strengthening of civil society, and identifying new national educational needs.

The report then goes on to identify five sets of goals, which the Working Party sees as essential to a revitalised ACE sector and makes recommendations in relation to each of these goals. These focus on the following:

- various strategies for gaining greater recognition of the ACE sector are identified (pp. 19-22) - The report recommends that the Education Act be redrafted to provide statutory recognition for the ACE sector and that this redrafting should recognise the philosophy of lifelong learning and its implications for all educational sectors, including the particular contribution of ACE as well as a Treaty-based approach. It also recommends the establishment of a national ACE Board (or an Advisory Board if TEC is established) to provide policy, research and funding advice, promote good practice, facilitate professional development opportunities, foster innovation, and provide field support to the networks, locally and nationally.
- structures and processes to enable ACE to be more effective in meeting the educational needs of communities are examined (pp.23-33) - The report argues that new forms of organisation and greater levels of accountability, both locally and nationally are needed if a revitalised and collaborative ACE sector is to meet the educational and social needs of the various communities.
- various approaches and strategies to ensure that ACE makes a more effective contribution to Maori development are discussed (pp. 34-37) - The report adopts a very wide-ranging approach to issues in Maori education and development and emphasises the central place which needs to be given to establishing an educational framework based on Te Tiriti o Waitangi which endorses tino rangatiratanga. It argues further that within this framework, ACE has an important contribution to make to Maori social development and must be funded accordingly.
- Funding (pp. 38-46) - The report argues that ACE should have 'secure, flexible, equitable and transparent funding' (p. 18) and that this is best achieved by establishing 'a single funding pool' (p. 39) by drawing together all public funds which currently derive from various sources and which are currently distributed by 'a confusing array of .. mechanisms' (p. 38).
- Sector capacity and capability (pp. 47-49) - Finally, the report argues that the capacity or capability of the sector needs to be strengthened through research, professional development and more effective information for guidance and referral.

In welcoming the report, Government decided that the recommendations of the Working Party should be developed further as part of the implementation process. Accordingly, in October

2001, a Ministry of Education ACE Reference Group was established and charged with the task of addressing the recommendations of the Working Party, giving priority to improving quality systems in ACE, improving ACE responsiveness to community needs, and improving monitoring and evaluation of ACE provision. Over the following twelve months the Reference Group was involved in a number of activities and projects designed to achieve these aims as well as to develop policy for funding ACE and revitalise the field. In April 2002 the first senior ACE position for many years - a Chief Advisor for Adult and Community Education - was established in the Ministry of Education.

The Tertiary Education Advisory Commission

In addition to the reviews described above which took place over the two-year period from early 2000 to late 2001, early in 2000 the Government had established a Tertiary Education Advisory Commission (TEAC) with the widest brief of all - to review all aspects of tertiary education. This Commission was appointed in April 2000 and published its first report three months later under the title 'Shaping a Shared Vision: Lifelong Learning for a Knowledge Society' (Tertiary Education Advisory Commission, 2000). The breadth of the government's thinking about the nature and scope of tertiary education was signalled in the preamble to the Commission's terms of reference which stated that:

Education provided by tertiary education providers, businesses, and community groups is vitally important to New Zealand in building a true knowledge society and achieving the economic benefits for such a society (Tertiary Education Advisory Commission, 2000 p. 32).

Clearly adult education and community learning as well as industry training was seen by government as an important part of the wider field of tertiary education, and this view was strongly endorsed by the Commission in its first report which concluded that the:

...tertiary education system should be broadly defined to encompass all formal and non-formal learning outside the school system (Tertiary Education Advisory Commission, 2000 p. 10).

Between July and December 2000 the Commission invited and considered submissions, and in February 2001 published its second report under the title 'Shaping the System' (Tertiary Education Advisory Commission, 2001c). This was followed in August 2001 by the third report entitled 'Shaping the Strategy' (Tertiary Education Advisory Commission, 2001b).

Although some may have seen the appointment of the Tertiary Education Advisory Commission (TEAC) as unnecessary, especially in the light of the previous reviews undertaken in the 1980s and 1990s, its brief was in fact significantly different and very much larger. By way of contrast with the reviews of the 1990s, the new government placed lifelong

learning close to the centre of its terms of reference for the Tertiary Education Advisory Commission (TEAC). Moreover, TEAC itself came to draw on the discourse of lifelong learning. It commenced its first report by quoting (Tertiary Education Advisory Commission, 2000 p. 6) from one of the strongest statements on lifelong learning I know of - a declaration by the Council of Ministers of Education of Canada published first in 1993 (Council of Ministers of Education of Canada, 1993 p. 2) and referred to again in a 1999 publication.

'[E]ducation is a lifelong learning process ... the future of our society depends on informed and educated citizens who, while fulfilling their own goals of personal and professional development, contribute to the social, economic, and cultural development of their community and of the country as a whole' (Council of Ministers of Education of Canada, 1999 p. 3).

Perhaps the greatest strength of this statement is that it is less individualised and more socialised than many other similar statements. The 'lifelong learning process is concerned with 'the future of our society' which 'depends on informed and educated citizens'. Learners, then, are 'citizens' not consumers, who not only look to achieve 'their own goals', but also 'contribute to.. social, economic and cultural development', and presumably engage in learning while making these contributions. Finally, the statement suggests that this learning is not necessarily limited to contributions to 'their community' but also to 'the country as a whole'.

Although the Commission does acknowledge these kinds of goals in its discussion of the purposes of tertiary education (Tertiary Education Advisory Commission, 2000 pp. 10-11), it fails to make the explicit links between lifelong learning and these wider goals and purposes. This failure, it seems to me, has profound consequences. It leaves the notion of lifelong learning without sufficient grounding in social theory and philosophy, and without this it remains one of those concepts which may be full of resonance but which signifies little or nothing.

Nevertheless, TEAC does draw on notions of lifelong learning at key points in its work. It does so firstly in its discussion of the nature and scope of tertiary education when it notes that it has chosen to define tertiary education broadly to include:

'... learning at all levels within public tertiary institutions (i.e. polytechnics, universities, colleges of education and wananga), programmes provided by private and government training establishments, business-based education, industry training, and all lifelong learning beyond the compulsory school system. It thus includes both formal and non-formal education, and what is often termed 'second-chance' education. Embracing these diverse forms of education and training is particularly important if the challenges of promoting lifelong learning and designing a tertiary

education system that contributes to the knowledge society are to be taken seriously'
(Tertiary Education Advisory Commission, 2000 p. 9).

Secondly, and perhaps most significantly, it stresses the important place of lifelong learning in its discussion of the contribution of tertiary education to the knowledge society:

'The demands that the knowledge society makes on individuals, business, industry, whanau, hapu, iwi, Maori and the wider community will necessitate New Zealand becoming very serious about lifelong learning, a concept that has to date been paid little more than lip-service' (Tertiary Education Advisory Commission, 2000 p. 11).

With these comments in the first report, TEAC sets the scene. These themes are picked up at several points in the second report which is focused on 'Shaping the System' (Tertiary Education Advisory Commission, 2001c). The notion of lifelong learning is drawn on first in the discussion on national and local responsiveness. The Commission states that it is not sufficient to have one or two providers to serve all New Zealand and to expect learners to travel.

'Lifelong learning should take place close to where people live, work and socialise. Nor is it sufficient to expect everyone to be successful learning in an open or distance-learning environment. While these technology-driven learning environments suit some, they are not appropriate for all. Regional tertiary education providers have an important role to play in the development of the regions in which they operate and it is vital this role be protected' (p.20).

Secondly, notions of lifelong learning also provide a key element in the discourse on access and the recognition of learning outside formal learning environments. Thus, the Commission states that:

'A genuine hunger for improvement in individuals for themselves and the communities in which they live can be a strong impetus for national development. For this to occur, lifelong learning, accessible throughout the country (in both urban and rural areas), is a necessity. Lifelong learners will enter formal education environments at many points in their lives. In between these periods of formal, credentialised learning, their learning experience does not stop. It continues in their workplaces, their homes and in the activities they undertake in their day-to-day lives. The system should be able to offer alternative pathways that encourage and foster participation by groups traditionally under-represented in tertiary education.' (Tertiary Education Advisory Commission, 2001c pp. 21-23).

Thirdly, the discussion on learning and technology for a knowledge society also draws on notions of lifelong learning. The Commission argues that technology and specifically e-learning is likely to play a major part in the provision of 'lifelong learning pathways and will

provide access for learners in distant geographical locations (p. 101).

This report was followed in July 2001 by a third report entitled 'Shaping the Strategy'. This begins with the statement that the overall aim of the government's '... strategy is to make New Zealand a world-leading knowledge society by providing all New Zealanders with opportunities for lifelong learning' (Tertiary Education Advisory Commission, 2001b p. 5). It goes on to state that this will require new ways of organising, delivering, and recognising tertiary education and learning.

The purpose of this third report was to develop a set of priorities for the tertiary education system together with a strategy for achieving these priorities as well as other goals. The first priority, it recommended, was to give attention to 'continuous quality improvement' (p.21) by means of such measures as 'better assessment of quality in terms of learning outcomes', 'more explicit financial rewards and incentives ... and sanctions', 'more effective institutional governance', and the 'encouragement of greater unbundling of services associated with learning' (p. 21). Managerialism reasserts itself and seems to underpin recommendations concerning quality. There is no reference here for example to the important role of teachers, scholars and researchers in the process of 'continuous quality improvement' and it seems indeed that learners are not seen to have any role in the process. Indeed the reports as a whole pay remarkably little attention to teachers and scholars in tertiary education.

A second priority was to give increased attention to what the commission refers to as the "top and bottom" of the system. 'By "bottom", the Commission means those people who have not achieved previously in education and who have no, or very low, qualifications. By "top", it means high-quality, world-class research and New Zealand's top learners' (p. 21). At the "bottom" end the Commission identifies a wide range of measures that might be taken to 'build stronger bridges into tertiary education' for those with minimal qualifications or limited skills. At the "top", the commission makes a range of recommendations with a view to enhancing tertiary research quality, capacity and linkages' (pp. 24-26).

Two points are worth noting here. Firstly, in spite of its earlier rejection of any narrow definition of the knowledge society, this recommendation seems to reflect and endorse a strongly hierarchical view of society and knowledge: there is a pyramid or ladder of learning and credentials; and the task is to ensure that those who have been barred entry should be allowed in at the appropriate level. The Commission does not pose questions about the nature of the pyramid itself. And yet, it could be argued that this is one of the key questions arising within a lifelong learning discourse. Secondly, in spite of the endorsement by government and by TEAC of the importance of maintaining close links between research and tertiary teaching,

and in spite of the emphasis placed on research-led teaching, this recommendation seems towards the severing of these links, at least at the level of funding.

A third priority identified by the commission is that of ‘developing the competencies and attributes, and the environment for a distinctive knowledge society’ (p. 26). The Commission rejects any narrow or specific definition of what is meant by a knowledge society; it argues instead that it is desirable to sustain a diversity of understandings of what counts as important knowledge. On the other hand, it does consider that there are some competencies and attributes that are fundamental to the development of knowledge societies. These include:

- *‘creativity, critical and reflective thinking, problem solving, technological competence, information retrieval, interpersonal and team skills, change management and an ability and desire to continue lifelong learning; and*
- *‘multidisciplinary and transdisciplinary thinking, learning, and research, that looks beyond the traditional classifications and boundaries of knowledge for the intersections that can produce new areas of knowledge, services, and products, and which address national priorities’ (p. 26).*

It is only in relation to this priority that the Commission engages once again with lifelong learning discourses. The Commission emphasises that its focus on the priorities described in this Report does not mean that the other outcomes identified are not important. On the contrary, it argues these must continue to be supported in order to achieve the vision of a knowledge society supported by access to lifelong learning for all (p. 49).

In November 2001, TEAC published its fourth and final report entitled *Shaping the Funding Framework*. Introducing this report, the Hon Steve Maharey, Associate Minister of Education (Tertiary Education), draws on lifelong learning discourses when he reiterates the view that the government’s broad aim in establishing the Commission had been ‘... to identify how New Zealand can develop a more co-operative and collaborative tertiary education sector that will better assist us in becoming a world-leading knowledge economy and society. Lifelong learning’, he declares, ‘is the lifeblood of a knowledge economy and society, and the Commission is committed to the development of a tertiary education system that is capable of fulfilling that vision’ (Tertiary Education Advisory Commission, 2001a p. i). The Commission itself affirmed this when it stated:

The Tertiary Education Advisory Commission was established by the government in April 2000 to devise a long-term strategic direction for the tertiary education system. The overall aim of the strategy is to make New Zealand a world-leading knowledge society by providing all New Zealanders with opportunities for lifelong learning (p vi).

This rhetoric, which locates lifelong learning at the heart of the tertiary education system, and which gives priority to co-operation and collaboration, is however substantially modified as

the Commission moves to look more closely at the proposed funding framework. Two things appear to happen. In the first place, these and other principles, which had been seen as fundamental in the earlier reports, come to be seen increasingly as compromised or contingent in this final report. In the second place, the thinking of the Commission seems to become increasingly economic, individualistic and competitive. For example the Commission states that it used eight principles to guide its thinking in the development of the funding framework. It states that:

‘Although it recognises that trade-offs between these principles may be necessary, the Commission believes that the new funding framework should:

- *promote the desired steering of the tertiary education system;*
- *be transparent;*
- *have low transaction costs;*
- *assign financial risk where it is most appropriate;*
- *ensure equitable access to lifelong learning;*
- *promote allocative, dynamic, and productive efficiency;*
- *recognise and respect academic freedom and provider autonomy; and*
- *accord with the principles of the Treaty of Waitangi’ (p.viii).*

The qualified nature of the Commission’s commitment to lifelong learning is evident in the ‘trade-offs’ referred to and particularly in the statement that: ‘The funding framework should promote equitable access to lifelong learning as far as possible in the context of constrained funding, differing learner needs, and the encouragement of excellence’ (p. 5).

This economicism and managerialism is reflected at many points in this final report, not least in the language and key concepts. For example the notion of rationing in relation to education, which the Commission sees as inevitable and which is central to the proposed framework, is problematic. It is grounded in a notion of education as a commodity. Moreover, the approach to rationing reflects neoliberal assumptions. The Commission does not argue the case for it. It merely asserts that rationing is necessary: ‘The fundamental question is not whether to ration public resources for tertiary education but how to do this’ (p. 56). Moreover, the Commission fails ultimately to move very far from a competitive funding framework, which is driven primarily by the apparent demands of individual students. These failures, which I believe stem from the Commission’s failure referred to earlier, to ground its recommendations in an adequate social theory and philosophy, give rise to real difficulties, as we are forced for example to choose between a range of options which assume the necessity of rationing education.

In spite of these criticisms, it may be argued that the Commission did succeed in moving the lifelong learning discourse some distance away from the kind of prostitution to multi-national

finance and global capitalism which Roger Boshier (2001) has described so eloquently. Where it was less successful was in its failure to link its philosophies of education and lifelong learning with a 'critical theory of society' (Murphy, 2000 pp. 176-7). Without this it is likely that the commodification of tertiary education under global capitalism may well continue apace.

The implementation of policies, 2002

As we have seen, over the period from 2000 to 2002, the Labour-led Government undertook a series of reviews covering a number of aspects of tertiary education. This was undoubtedly necessary. The decade of the 1990s had seen rapid growth in the number of participants enrolled in formal tertiary education and industry training, the establishment and growth of the qualifications framework, and a growth in the number and range of organisations including private training establishments offering courses, including degree courses, leading to qualifications registered on the qualifications framework. At the same time, adult and community education, embracing those forms of learning and education which take place beyond the qualifications framework, had been largely ignored. In addition, the level of Government funding per full-time equivalent tertiary student had steadily declined, as increases in expenditure by the state on tertiary education had lagged far behind the growth in student numbers. This led among other things to increases in student fees and in student debt, and an increasing sense of crisis in various sectors of the tertiary system including the universities and many voluntary organisations.

In the light of this, many educators looked for urgent action from Government following its election. What they got was some ameliorative action. For example a freeze was imposed on the interest charged on student loans during students' periods of study, and tertiary institutions receiving funding from the state were required to hold their fee increases to predetermined levels. The relatively low level of urgent and substantial action by Government in 2000 and 2001 evoked widespread criticism from many educators. Many observers therefore anticipated that 2002 would be the year of decision and action.

The Tertiary Education Reform Bill: In December 2001 the Government promulgated the Tertiary Education Reform Bill (New Zealand Government, 2001). This Bill, which the government hoped would be enacted in time to come into force from 1 July 2002, was intended to give effect to the Government's decisions on the reform of the whole tertiary education system. It was based largely on the recommendations of the first two reports of the Tertiary Education Advisory Commission.

The explanatory note accompanying the Bill claimed that the reforms would ensure that

tertiary education in New Zealand would make ‘... more strategic use of resources through a more co-operative and collaborative tertiary education sector’ (p 1). Action was required, it claimed, ‘... to shift from a fragmented, competitive approach to a more integrated and strategic approach that will foster a greater sense of partnership and collaboration between key contributors to the sector, and greater involvement by, and responsiveness to, stake-holders such as business, Maori, and the wider community’ (p 20). Inter alia it was also stated that the Bill would directly strengthen the industry training sector of the tertiary education system and the role of the NZQA in quality assurance. With regard to the definition of tertiary education the explanatory note states that: ‘The tertiary education sector includes all formal education and training post-school: public tertiary education institutions (TEIs), private training establishments (PTEs), adult and community education, industry training, Training Opportunities, and Youth Training’ (p 20). However the Bill contains no mention of nonformal or informal education or lifelong learning; nor does it contain any specific measures to ensure the legislative protection of adult and community education.

On the other hand, the Bill does specifically include ‘community education providers’ within its definition of a ‘tertiary education provider’ (p 5). In addition, it broadens the provisions of section 321 of the Education Act by stating that grants out of public money may be paid by Parliament to any organisation or ‘educational body ... that is recognised by the Minister as a body that provides any educational or developmental service or facility’ (pp 32 & 55). It would seem that this provision would allow for the funding of small voluntary organisations and community groups involved in adult education without the necessity of setting up separate charters or profiles. For the most part, however, it seems that the expectation is that organisations involved in adult and community education, along with all tertiary education institutions, private training establishments, Industry Training Organisations, organisations involved in the provision of youth training and Training Opportunities, as well as any other tertiary education providers will be required to negotiate charters and profiles with the Tertiary Education Commission.

The stated purpose of the Bill was to amend the Education Act of 1989 and the Industry Training Act of 1993 ‘in order to reshape the tertiary education sector to achieve greater coherence between different parts of the sector and more strategic use of resources’ (p 3). It was envisaged that this would be achieved by means of the following:

- A Tertiary Education Commission was to be established. It was to have responsibility for giving effect to the Government’s statement of priorities through the processes of negotiating charters and profiles with organisations, allocating funds to and building the capability of organisations and giving advice to the Minister on matters relating to the Tertiary Education Strategy and the statement of tertiary

education priorities. Its responsibilities therefore extended to all aspects of tertiary education as defined above.

- The Minister of Education was to be required to issue two fundamental documents: Firstly, from time to time a 'Tertiary Education Strategy' was to be approved and presented to Parliament. Secondly, at least once in every three years, the Minister was to be required to issue a statement of tertiary education priorities which set out the Government's priorities for tertiary education.
- The requirements for organisational charters were to be extended, and organisational profiles were to be introduced with a view to strengthening the Commission's and the Minister's capacity to 'steer the tertiary education sector'. An organisation's charter was defined as a document that sets out the organisation's mission and role in the tertiary education system; and is intended to cover a medium- to long-term timeframe. An organisation's profile was defined as a document, which must be publicly available, that sets out the organisation's operating plans, key policies, and proposed activities for the next 3 years; its objectives, performance measures and targets used by the organisation; the short- to medium-term strategic direction of the organisation, and the activities of the organisation for which it seeks or receives funding from the Commission.
- A new approach to state funding for the sector as a whole was to be set in place in order to create consistency in the use of criteria and mechanisms for funding organisations across the entire tertiary education sector, as well as to secure the strategic use of state resources.
- The New Zealand Qualifications Authority was to have the authority to set conditions on, and to suspend, accreditations, course approvals, and registrations.
- Skill New Zealand was to cease to exist as a separate agency and would be absorbed into the Tertiary Education Commission, and a number of measures were to be taken with a view to incorporating industry training within the wider field of tertiary education and improving the effectiveness and responsiveness of the industry training system.

The Tertiary Education Strategy: In December 2001, in addition to promulgating the Tertiary Education Reform Bill, the Associate Minister of Education launched the first draft of a Tertiary Education Strategy for the five year period from 2002 to 2007 (Office of the Associate Minister of Education (Tertiary Education), 2001a). This was done with considerable publicity, and submissions were invited by 28 February 2002.

Then in May 2002 a final revised version of the Tertiary Education Strategy was published (Office of the Associate Minister of Education (Tertiary Education), 2002d).

This document summarised the key elements of the ‘comprehensive programme of tertiary education reforms’ as described above. In addition, it identified the following two elements.

- Firstly, it referred to ‘the introduction of an assessment of strategic relevance to determine charter and profile alignment with the *Strategy*, and thus funding approval’.
- Secondly, it referred to the ‘better integration of the Industry Training system, Adult and Community Education and Training Opportunities and Youth Training programmes, within the wider tertiary education system’ (p 6).

It then went on to describe the following six strategies to be pursued over the ensuing five years:

- **‘Strategy One: Strengthen System Capability and Quality’.** It argues that ‘national goals cannot be achieved unless the strategic capability and robustness of the tertiary education system as a whole is enhanced’.
- **‘Strategy Two: Te Rautaki Mātauranga Māori – Contribute to the Achievement of Māori Development Aspirations’.** It argues that there is a ‘need to recognise the unique position of Māori as Treaty partners, and the huge significance that learning and education has for Māori communities. This strategy addresses issues related to skill development, research and capability-building for Māori’.
- **‘Strategy Three: Raise Foundation Skills so that all People can Participate in our Knowledge Society’.** It argues that ‘improving foundation skills (literacy, numeracy and other basic skills), will ensure that more New Zealanders are able to participate effectively in the economic and social benefits of our vision for national development’.
- **‘Strategy Four: Develop the Skills New Zealanders Need for our Knowledge Society’.** It argued that ‘this strategy recognises that we will need high-level generic skills in much of the populace, and more highly-specialist skills in areas of comparative advantage, for New Zealand to accelerate its transformation into a knowledge society’.
- **‘Strategy Five: Educate for Pacific peoples’ Development and Success’.** It points to the fact that Pacific peoples represent a significant and rapidly growing proportion of New Zealand’s population, and argues that ‘this strategy addresses issues relating to Pacific peoples’ capability needs and skill development that will ensure their success and development’.
- **‘Strategy Six: Strengthen Research, Knowledge Creation and Uptake for our Knowledge Society’.** This strategy, it argues, ‘recognises that research and innovation are key drivers of modern economies, and also that the broader application of new knowledge will enable the achievement of social, environmental

and structural goals' (Office of the Associate Minister of Education (Tertiary Education), 2002d p 16).

This document was followed, in May, by the release of a document entitled 'Excellence, Relevance and Access' which updated some of aspects and included information on the new Integrated Funding Framework (Office of the Associate Minister of Education (Tertiary Education), 2002a).

The Statement of Tertiary Education Priorities: Finally, in July 2002, the first interim Statement of Tertiary Education Priorities (STEP) for the two-year period 2002-2003 was published (Office of the Associate Minister of Education (Tertiary Education), 2002b). In his foreword, the Minister described some of the government's expectations. These included the following:

While the Government is expecting our tertiary system to contribute much more explicitly to critical national development goals, this change in focus must not jeopardize the high participation levels of the last few years. Specifically, Government wishes to 'steer' the new system in a manner that improves the:

- *quality of teaching;*
- *quality of research; and*
- *quality and strength of relationships, both within the tertiary system, and between the tertiary system and other important sectors of New Zealand's economy and society (pp 4-5).*

This document then sets out Government's short-term priorities over the two year period for the tertiary system as a whole. In addition, it sets out priorities for Tertiary Education Organisations and Government agencies, in each of the strategic areas referred to above.

- Thus, in relation to Strategy One above - strengthening system capability and quality - it claims that the critical priority for Tertiary Education Organisations is 'the need to improve their strategic capacity and leadership ... at management and governance level' (p 13). Other major priorities, it suggests, involve TEOs working with their stakeholders to increase understanding of their strengths and areas of focus. This in turn will provide the basis for increased differentiation and specialisation across the system as a whole as well as greater collaboration.
- In relation to Strategy Two - contributing to Maori development aspirations - it states as a key priority that 'TEOs should work closely with their local and regional Māori communities in order to improve their accountability to them and .. ensure that organisations contribute to regional and local Māori/whānau/hapū/iwi development' (p 14).
- In relation to Strategy Three - raising foundation skills - it is envisaged that

TEOs will 'analyse and determine their distinctive contributions to foundation skills development within the tertiary education system and reflect this in their strategic and business plans' (p 16).

- In relation to Strategy Four - developing the generic and specialist skills of New Zealanders for the knowledge society - it states that, although this represents a critical area to support New Zealand's long-term goals, it is unlikely to be a major priority for most TEOS during the two-year period (p 17).
- In relation to Strategy Five - education for Pacific peoples' inclusion and development - it states that 'TEOs should continue to work on the implementation of the *Pasifika Education Plan*, as outlined on page 51 of the Tertiary Education Strategy' (p 18).
- In relation to Strategy Six, it states that strengthening research, knowledge creation and uptake should be key areas of development for universities, polytechnics and wananga over the period. This may be achieved in part, it is suggested, by identifying their own distinctive specialisations as described in Strategy One above (p 19).

By mid-2002, it is clear that a great deal of detailed planning had been done by Government, and it was anticipated that the new legislation would be enacted in the near future. This legislation and hence the formal establishment of a variety of agencies and processes was, however, delayed when an early General Election was called in August. In the elections a new Labour-led Government was elected, with the support of the Anderton Progressives and United Future following the decimation of the Alliance Party. As a consequence of the elections and other delays, it seemed that the legislation might only be passed by Parliament late in 2002 or early in 2003.

Conclusion

This chapter began by looking at the renewal of lifelong learning discourses and the progressive challenges to neo-liberal discourses of globalisation which had dominated policy formation in the 1990s. It was only following the election of a Labour/Alliance government in 1999 that interest by the state in lifelong learning and adult education discourses was revived. The chapter looked at some of the ways in which key policies and strategies were developed through the work of several review groups and working parties and through the publication of key strategic documents. This included work setting in place 'modern apprenticeships', reviews of the Training Opportunities and Youth Training programmes and industry training policies and practices. It also included the adoption of the first official adult literacy strategy and the work done to legitimate and secure recognition for a very wide range of adult and

community education programmes. The chapter then moved to look at some of the strengths and limitations in the work of the Tertiary Education Advisory Commission, the group charged by Government with the widest brief of all - to review all aspects of tertiary education. in its attempts to advance a more progressive interpretation of lifelong learning.

The chapter included a discussion of the Tertiary Education Reform Bill, the major piece of legislation introduced in December 2001, designed to 'reshape the tertiary education sector to achieve greater coherence between different parts of the sector and more strategic use of resources'. It then summarized the two key strategic documents released in 2002, namely, the document setting out the Government's Tertiary Education Strategy for the five year period from 2002 to 2007 and its Statement of Tertiary Education Priorities for 2002 and 2003.

We have looked in this chapter at some of the ways in which the Labour/Alliance Government set about introducing a comprehensive programme of tertiary education reforms. Some of the strengths and limitations of the process from the point of view of progressive discourses on lifelong learning and adult education have been noted. On the positive side, it would seem that a genuine attempt has been made to maintain an open and accessible system of tertiary education defined broadly to include all forms of formal and nonformal learning and education. Reactionary proposals to ration tertiary education as recommended in the fourth TEAC Report have been dropped and considerable effort has been made to move toward a more inclusive system which serves more effectively those who have historically been largely excluded. At the same time priority has also been given to the importance of striving for excellence in both research and teaching and moving to a system which will be more collaborative and recognise the aspirations of learners and other stakeholders in the wider society.

On the other hand, aspects of the reforms remain limited. Several of the reports and documents including the two latest strategic documents are strongly shaped by managerialist discourses and technicist assumptions rather than by discourses grounded in historical or social analysis. In view of this it is inevitable that these reports and documents are unable to take into account many historical and social forces which cannot be controlled by management. Many contextual factors as well as interactive factors at the intersection of learning, teaching and resource use and those factors which are idiosyncratic, unpredictable, or chaotic and which therefore cannot be controlled by management or by Governments tend therefore to be ignored or discounted. Not unrelated to this it should be noted that, despite the rhetoric of openness and inclusiveness, much of the thinking underlying many of the reforms is driven by a narrow, exclusive, measurable and hierarchical understandings of the nature of learning and education.

For example, considerable effort is made with greater or lesser success in the various documents and reports to present a definition or interpretation of tertiary education which is open and inclusive. In the foreword to the Tertiary Education Strategy document, for example, the Associate Minister of Education writes that by 'tertiary education' he means

'all of the learning that takes place in the field of post-school education and training. 'Tertiary education' in this sense includes what is generally known as tertiary education and training. It is as much about what happens on the job as it is what happens in universities and research institutes. It is as much about foundation education and training which bridges people into further education and training, or into a job, as it is about world-class doctoral study. It is as much about relevance as it is about excellence' (p 4).

This statement reveals both an attempt to be open and inclusive - 'tertiary education' is as much about what happens on the job as it is what happens in universities and research institutes. It is as much about 'foundation education and training' as it is about 'doctoral study'. However it also reveals some other assumptions about the way in which 'tertiary education' is or should be constituted. It seems to imply that 'tertiary education' is or should be organised into a series of steps which fit together: 'Foundation education and training' programmes should 'bridge people into further education or into a job..' It seems that there is little room here and in several other documents for those forms of learning and education which take place beyond the qualifications system. Even ACE is too readily thought of in terms of access or foundation education, rather than being seen as valuable in its own right or in terms of its contributions to the social good. Too little recognition is given to wider understandings of learning and education which take place in the public library, art gallery and museum, or in the bus or train on the way to paid work, on the job or in the tea-room at work or at home with family and friends or alone or listening to the radio or watching television or on the internet.

One is left wondering whether some of the Government's expectations and priorities are likely to remain rhetorical within a system which is continuing to impose increasing pressures on many students, teachers, researchers and volunteers. One is left wondering about the priorities of a Government which struggles to raise the funds to rescue parts of an existing tertiary system, while still maintaining a relatively low marginal tax rate on high income earning and very wealthy New Zealanders. Under a system of global capitalism, it should however surprise no one to note the considerable political difficulties and struggles inherent in any attempt to move resources away from the short-term interests of global capital into the service of the advancement of the public interest in education, health, welfare and the environment.

In the next chapter, we look at trends in participation by adults in education over the period from the mid-1970s to the mid-1990s. Although it is impossible to make direct links between the major policy shifts and discourses described in this chapter and the trends in the next, it would seem that some of the shifts have influenced patterns of participation as described in the next couple of chapters. In addition, it seems that they have influenced other developments described later in this book.

Section 2

Issues of Participation

This section is devoted to issues of participation and non-participation. However, the approaches taken in examining these issues and indeed the issues themselves differ markedly from one chapter to the next. I do not believe that either chapter provides definitive answers to the questions raised. Nevertheless, in their very different ways, they do constitute original pieces of research and should throw fresh light on some key questions. Perhaps more importantly, I hope that the juxtaposition of the contrasting research approaches will help to clarify questions and issues which need to be addressed as well as suggesting some of the issues of methodology which need further attention.

The first chapter of the section (Chapter 4) undertakes a review of the four national sample surveys conducted between the mid-1970s and mid-1990s, which included questions on the educational participation by adults in Aotearoa New Zealand. Key methodological issues addressed include the lack of consistency over the years in the definitions and sampling methods used. However the chapter endorses the importance of continuing to use survey methods in order to gain a picture of trends and patterns of participation. Despite the limitations of the data arising from the lack of consistency, the chapter draws on these surveys to identify participation trends and patterns over the period. This has not been done elsewhere previously. The chapter concludes, among other things, by pointing to: the radical differences between surveys of the 1970s & 1980s which emphasised social and educational imperatives and were driven by national agendas, and those of the 1990s which emphasised economic and workplace imperatives and were driven by supranational agendas.

By way of sharp contrast, the next chapter (chapter 5) challenges and critiques the positivist assumptions, which underlie the kinds of surveys discussed in Chapter 4. Instead, it presents some findings and reflections arising out of an ongoing qualitative study, which looks at the experiences and perspectives on learning and education of people from working class backgrounds. Drawing on data derived from in-depth interviews, the chapter presents a series of seven case studies. It then explores the ways in which people with little or no experience of formal post-compulsory or tertiary education perceive their own learning and education, and the forces and experiences from childhood through to adulthood that shape the different perceptions, interests and attitudes toward different kinds of learning and education. The chapter identifies some ways in which common experiences of class and gender affect the learning and educational patterns of working class women and men as well as some ways in which experiences vary, as different women and men seek to take control of their own lives and shape their own destinies, and concludes by highlighting some policy issues. In particular,

the chapter raises the question whether participation by all in formal tertiary education is necessarily a desirable positive objective. It suggests that pressure to participate in formal studies may not be in everyone's best interests. On the other hand, everyone should have access to those learning and educational resources which they require to further their interests.

Chapter 4¹

Trends in educational participation by adults in Aotearoa New Zealand, 1977-1996

Introduction

This chapter begins by noting that extensive overseas research has raised a variety of policy issues and pointed to a ‘great divide’ between educational participants and non-participants within the adult population. By comparison, it is suggested, we have a patchy record of research on these issues. The chapter then goes on to review four substantial national sample surveys conducted between the mid-1970s and mid-1990s, which included key questions on the educational participation by adults in Aotearoa New Zealand. Selected methodological and substantive issues are addressed. These include questions about similarities and differences in the patterns of participation in educational activities between women and men, Maori and Pakeha, people of various ages, people in paid jobs and those not in paid jobs, people in various kinds of paid occupations, and by those from cities, small towns and rural areas. The chapter concludes, among other things, by pointing to: the continuities and discontinuities within a variety of ‘divides’ over the period including those of class, gender, cultural background and age; and the radical differences between surveys of the 1970s & 1980s which emphasised social and educational imperatives and were driven by national agendas, and those of the 1990s which emphasised economic and workplace imperatives and were driven by supranational agendas.

Background and purposes

Extensive and ongoing survey research in several other countries at a time of considerable expansion in the provision of tertiary and adult education and training has raised a number of policy issues. In particular this research has pointed to the continuation of a ‘great divide’ between educational participants and non-participants within the adult population (See for example OECD, 2000; Naomi Sargent, 2000; See for example N. Sargent, Field, Francis, Schuller, & Tuckett, 1997). By comparison with many other countries, New Zealand has had a patchy record of gathering data on patterns of participation and non-participation by adults in educational activities. This chapter argues that further research in this area is needed, not least in order to identify changes in participation patterns following two decades of policy change. The chapter reviews selected methodological issues and findings arising out of previous studies. I hope that this will help future researchers to avoid re-inventing methodological

wheels and that it will provide a useful basis for a movement away from ‘snap-shot’ surveys towards studies which seek to build pictures of participation trends over time (essential if we are to identify the impact of policy changes).

Until about forty years ago, nearly all studies of participation by adults in education around the world were limited to identifying and describing the characteristics of participants within one or two particular institutions or localities or programme areas. In New Zealand, studies of this kind include one by Roger Boshier comparing participants in university extension, WEA and school-based programmes in Wellington in the early 1970s (R. W. Boshier, 1970, 1971). They also include a study by Chris Horton of the characteristics of participants in university extension programmes in the Waikato in the mid-1970s (C. W. Horton, 1976); as well as a range of surveys of participation in university, polytechnic and school programmes conducted over the years by such organisations as the University Vice-Chancellor’s Committee and the Ministry of Education, as well as by a number of government-appointed review bodies. The continuing importance of this kind of study is illustrated by a recent study of students at Victoria University who were 40 and over carried out by Judith Davey (2001).

Internationally the development of large-scale surveys of adult education participation dates back only about 40 years. The first such national study was conducted in the U.S.A. by the National Opinion Research Centre in the early 1960s (Johnstone & Rivera, 1965). This study, which was the first to highlight and quantify the very large scope, diversity and richness of adult learning, proved to be very influential: it provided the inspiration for a large number of similar surveys over the following years both in the U.S.A. and in other countries (See for example Gould, 1974). In New Zealand, the first such study was undertaken on a city-wide basis in 1974 by the Department of Extension Studies, University of Canterbury (Department of Extension Studies, 1975). This was followed by a national study undertaken in 1977 under the leadership of Denny Garrett who was then Director of Continuing Education in the Department of Education. The publication of this report was however delayed, with a draft report being published in 1979 (Department of Education, 1979) and a final report in 1981 (Bird & Fenwick, 1981).

Over the past twenty years or so there have been widespread criticisms of the positivist assumptions underlying large-scale, national sample survey studies of educational participation by adults (See for example Benseman, 1989; Harré Hindmarsh & Davies, 1995; See for example Rockhill, 1982; Tobias, 1998). In spite of this, and by way of sharp contrast with the argument presented in chapter 4, this chapter argues that such studies do serve the

¹ This chapter is based on a paper presented at the annual conference of the New Zealand Association for Research in Education held in Christchurch, December 2001.

purpose of documenting trends and patterns and raising questions for further research. More specifically, I believe that further national sample surveys of adult learning and education are needed to provide additional information to set alongside the findings of qualitative, ethnographic and participatory research in developing policies. In making the case for this, the chapter draws on the findings of the four national surveys to illustrate some of the issues and questions that could usefully be addressed by a further study. John Benseman (1979; 1992; 1996) is among many researchers (Courtney, 1992; Cropley, 1989; McGivney, 1993; OECD, 1979) throughout the world who have reached similar conclusions on the socio-economic and demographic characteristics of participants and non-participants in adult education programmes.

With regard to New Zealand, Benseman points out that:

Participants in adult/community education programmes include disproportionately high numbers of:

- *those who have attended school more than an average amount of time and passed formal qualifications*
- *women (although men tend to be in a majority in more vocationally oriented courses)*
- *those under 40 years of age*
- *Pakeha*
- *those who have above-average incomes*
- *people who are in full-time work and most often in a white-collar occupation.*

Conversely, those underrepresented disproportionately include:

- *the elderly*
- *ethnic minorities*
- *immigrants*
- *those who left school early*
- *those on low incomes*
- *people who are unemployed or work in semi- or unskilled jobs*
- *women with dependent children.*

In a word, the marginalised (Benseman, 1996 p. 277).

Drawing on the studies referred to above, this chapter investigates some of these generalisations about the relationships between educational participation by adults and such factors as their schooling, gender, age, culture and occupation. In particular, it examines some of the trends in participation over a twenty-year period from the mid-1970s to the mid-1990s. Wherever possible these findings are linked with wider changes in social policy, and an

attempt is made to compare some of the New Zealand findings with those in other OECD countries.

Methodological issues

As indicated above, the data used in this chapter are drawn mainly from four surveys. The first was conducted by the Department of Education (DoE) in February 1978 (Bird & Fenwick, 1981; Department of Education, 1979); the second in the latter part of 1987 as a small component of a wide-ranging survey of attitudes and values for the Royal Commission on Social Policy (RCSP) (Richardson, 1988); and the third, which formed part of an international survey conducted for the OECD in March 1996 (IALS), was focused on adult literacy, but included a number of additional questions on adult participation in education and training (OECD, 1997; O'Connell, 1999). Finally, a fourth study, the Education and Training Survey (ETS), was conducted by Statistics New Zealand in September 1996, i.e. only six months after the IALS survey, as a supplement to the quarterly Household Labour Force Survey (HLFS) (Statistics New Zealand, 1997). In addition, some references are made to findings of the 1996 Census.

In view of the fact that four relevant surveys were undertaken within the two decades between the mid-1970s and the mid-1990s, it might be thought that we would have substantial continuity of data over this period. This is however not the case. The purposes, parameters and policy requirements of each of the surveys have varied, and these have tended to shape the questions asked, the nature of the samples drawn and decisions on other methodological issues. Moreover, it would seem that those responsible for each of the surveys were for the most part unaware of the previous ones and failed to take them into account in making design decisions. The following then are some of the variations that have occurred.

Definitions of 'adult' have varied. In studies in the USA and elsewhere dating back to the 1960s, 'adults' were often defined as 21 year-olds who were no longer full-time students. Surveys in New Zealand Aotearoa have set a much lower age limit and generally (though not always) included full-time students at secondary and tertiary institutions. In these studies, the lower age limit has varied between 15 and 16, and while some surveys have included older adults, others have set an upper age limit of 65. Most but not all of the studies have been limited to the civilian population not resident in institutions who are not living abroad.

The 1977 DoE study drew its sample of 1,500 interviewees from all those aged 16 and over who were not full-time secondary school students. The RCSP survey by contrast drew its very much larger sample of 22,250 interviewees from all those 15 and over and included full-time

school students. The IALS survey sample contrasts in different ways from the previous surveys. It drew its 4,223 interviewees from a population ranging in age from 16 to 65, thus excluding both 15 year-olds and those older than 65. In setting the 65-year age limit, the New Zealand government joined the company of governments of such other countries as Germany, Ireland, Poland, the UK and the USA. By way of contrast, Australia included all those between 15 and 74; Canada, Sweden and Switzerland included all adults 16 and over, and the Netherlands included all between 16 and 74. Finally, the ETS drew its large sample of 22,250 interviewees from a population consisting of those between 15 and 64. Full-time students were included and the sample was intended to reflect what was described as the working age population.

By way of contrast with several overseas studies (which have asked respondents about their current learning, their learning over one year or over a three-year period, as well as over the entire period of their lives since they left secondary school), all studies reviewed here have asked respondents to think back over a one-year period. In other respects, however, definitions of 'education' and the approaches and methods used to gather data have varied. The DoE survey is the only one focused exclusively on participation by adults in educational activities. It used an extensive hour-long structured interview. For this survey, the definition of education was driven by the fact that the Department of Education (as it then was) was primarily interested in finding out how effectively adults' learning needs & interests were being served by the wide range of organisations and tutorial services that were available. Hence, the primary focus was on what were called 'agency directed learning activities'. For an activity to count as an 'agency directed learning activity' it had to meet the following criteria:

- it had to be planned by an 'agency', i.e. an organisation or tutor (excluded were those individual learning projects that were entirely self-planned or self-directed; also excluded were those group or movement-based learning activities that were planned and organised by the groups themselves without recourse to any external agency or tutor);
- the main purpose of the activity had to be that of helping participants to gain knowledge and understanding or to acquire or improve a skill in a subject or area;
- the learning had to take place using one of the following methods: private lessons or one-to-one tuition or coaching, attendance at a class or courses, attending talks or participating in conferences, or being a member of an organised discussion group or taking a correspondence course; and
- the activity had to consist of either a correspondence course or three or more meetings of any length or one or two meetings at least six hours in length altogether.

The purpose of the 1987 RCSP survey's questions on educational participation is not made explicit in the report. However, it would seem that the Commission viewed education as an

element of social policy and was interested in finding out how effectively various forms of education were meeting the needs of various sections of society. This was however but one aspect of interest. An hour-long interview canvassed a wide range of experiences, attitudes and values, and only one set of questions was relevant to the field of adult learning and education. The key questions were phrased as follows:

Have you received any education of any kind in the past 12 months? I mean any sort of learning at courses, at work or elsewhere, or any sort of private lesson?

What sort of education was that?

Interviewers were then instructed to probe and record one or more of the following: Parent involvement in preschool (e.g. Kohanga reo or Playcentre); secondary; tertiary; on-the-job training (including courses attended outside of work); hobby, interest, cultural (continuing); other; and, don't know.

The main purposes of the IALS survey conducted in 1996 were to ‘... develop measures and scales that would permit useful comparisons of literacy performance among people of a wide range of ability... (and) to describe and compare the demonstrated literacy skills of people from different countries’ (OECD, 1997: 12). The lengthy interview process, which was conducted in interviewees’ homes, was thus mainly devoted to testing interviewees and obtaining background information. Although the focus of the Survey was on literacy (including prose, document and quantitative literacy), it also included a section dealing with adult education and training. This section was introduced by interviewers as follows: “The following questions will deal with any education or training which you may have taken in the past 12 months.” The first question in the section was then phrased in the following way:

During the past 12 months, that is since April 1995, did you receive any education or training, including courses, private lessons, correspondence courses, workshops on-the job training, apprenticeship training, arts, crafts, recreation courses, or any other training or education?

This was followed by a series of questions on the names of courses or programmes taken (if any), the qualifications sought (if any), the source of financial support (if any), the organisation/s offering the course/s, where it/they were held, their reasons for taking the course/s, the length of the course/s, and any barriers or reasons for not taking courses that respondents said they had wanted to take but hadn’t taken.

The purpose of the 1996 ETS, which formed an extensive supplement to the HLFS, is not made explicit in the report on the survey. However, its focus was clearly on identifying data relevant to the promotion of the development of human resource and training. Interviewees were asked about their recent participation (i.e. over the past 12 months) in study towards an educational qualification or in in-house training or external training. This was followed by

questions on employment-related courses respondents would like to do, courses stopped before completion, existing post-school qualifications, length of time in education, length of time with employer and annual salary.

The report states that definitions of education and training were based on work done by the OECD and the Australian Bureau of Statistics. Employment-related training was divided into in-house and external training. In-house training was defined as that organised by an employer primarily to meet the needs of its own employees, conducted in-house or externally, and delivered by the company's own employees or by external training providers. External training was defined as that organised by training establishments, educational institutions, agencies or consultants other than the respondent's employer, conducted outside the respondent's place of employment, and delivered by people other than employees of the company. Thirdly, for the purpose of identifying study undertaken for an educational qualification, this was defined as an award for attainment of a formally recognised qualification from a recognised provider. It equipped the learner with skills or knowledge which could be identified in terms of the standard attained (i.e. level) and the field (post-school qualifications) to which it related. 'Formally recognised', it was stated, meant 'assessed under the auspices of the NZQA, or awarded overseas by a recognised authority'.

Finally, reference should be made to the way in which the relevant census data were gathered at the 1996 Census. This Census included the following question: 'In the (7 days before the census), did you: attend or study for a full-time course at school or anywhere else; attend or study for a part-time course at school or anywhere else; neither of these things' (Question 30, Individual Form, Census 1996). The notes defined a full-time course as one which 'you spend 20 hours a week or more on (including times at classes, studying, etc.)' This question was followed by questions on educational qualifications.

Trends and patterns of participation

In view of the major methodological differences between the studies, it is not surprising to note that the findings of the various surveys are also very different. There are, nevertheless, some findings which are worth highlighting, and this chapter focuses mainly on those themes and issues for which more or less comparable data are available over a period of some years.

(a) What proportion of the overall adult population participated in educational activities? And were there changes in these overall patterns of participation over the twenty-year period?

As indicated above, differences in sampling methods, interviewing approaches and questions

asked mean that there is only limited comparability between the surveys. Thus, for example the 1996 census data suggest that only 6.8% of adults 25 and over were participants. By way of contrast, the 1996 IALS study found that 46.4 % of those 25 and over were participants (O'Connell, 1999). The explanation for these very different findings lies in the methodology. The census data refer to participation in the seven days prior to the census, whereas the IALS study, in common with the other studies reviewed here, refers to activities undertaken in the 12 months prior to the survey. In addition, the census data include older adults 65 and over whereas the IALS data were limited to those under 65.

In spite of the differences between the other surveys, it is possible to draw some comparisons between them. For example, we can compare the 1977-78 DoE and 1995-6 IALS survey data for adults between 16 and 64 years of age. Both surveys excluded full-time secondary school students. In 1977-8, it was found that 34% of the 16 to 65 year age group participated. This compared with 47.5% of those in the same age-range in 1995-6. This reflects a marked increase in overall participation. On the other hand it is important to note that these figures are several years old, that the survey was undertaken at a time when tertiary fees and the costs of student loans were increasing dramatically, and that these increases may well have had an impact on the patterns of growth in recent years. Certainly, the Ministry of Education (2000) (2001) has suggested that the growth in participation in tertiary education, which had been a strong feature of the 1980s and early 1990s, had slowed in the latter part of the 1990s and that there were signs that it was levelling off.

(b) What kinds of education did people undertake? And in what ways did this change over the period?

Once again, limited comparable data are available. However, Figure 3.1 summarises information from the 1977 DoE and 1996 ETS surveys on the kinds of educational programmes undertaken over a 12-month period. In both cases, the data on full-time secondary school students have been excluded. This presents some striking findings, which are perhaps not unexpected. In the first place, the proportion of the adult population who undertook formal qualifications-oriented education increased substantially from 4.7% to 13.4%. Secondly, the proportion who had participated in job-related education or training also increased from 11.3% to 14.6%. Thirdly, the proportion involved in other kinds of education, including programmes in the arts, crafts, cultural, political, social and religious areas, fell away substantially from 18.1% in 1977 to 12.0% in 1996. Whereas in 1977 more people participated in these forms of education than in any other, in 1996 it seems that fewer people participated in them than in formal qualifications-oriented or job-related education or training.

Figure 3.1
Percentage of population aged 16 to 64 who participated in various forms of education in 1977 & 1996



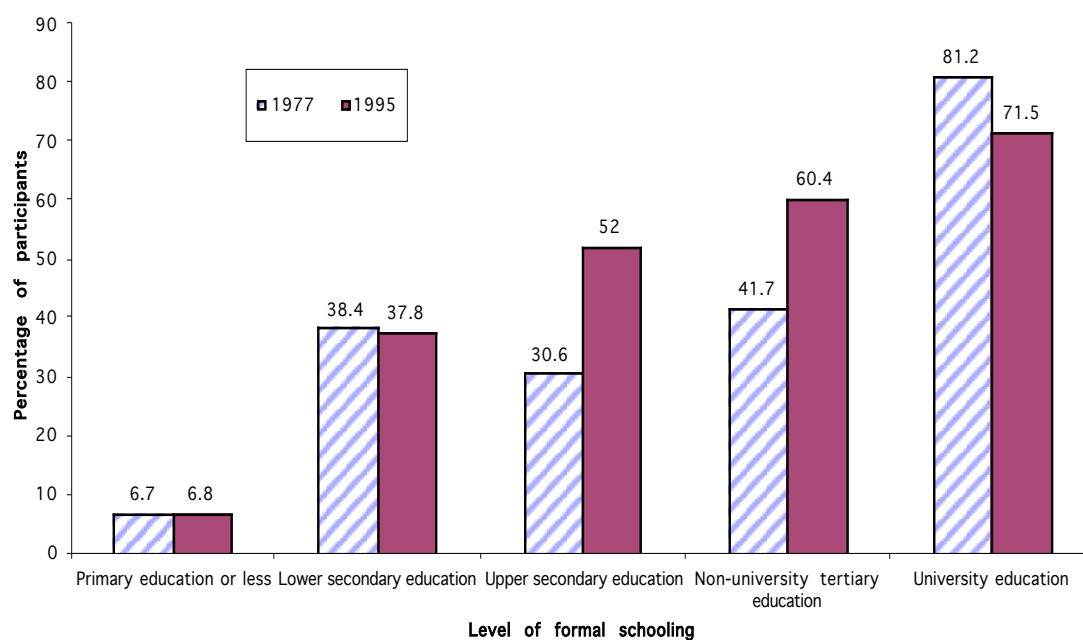
The data presented here suggest that the period was marked by a greater degree of instrumentalism and greater pressures towards credentialism. The data support the hypothesis that it was the strengthening of these factors rather than any overall growth in participation that is the most significant feature of the twenty-year period.

(c) What differences (if any) were there between participants and non-participants in terms of level of formal schooling? And were there any changes in the relationship between level of schooling and participation over the period?

Data from all of the studies confirm that there were clear differences in levels of formal schooling between participants and non-participants in educational programmes. For example, the 1995-96 IALS Survey found that the rates of participation by those aged 25 to 64 were related to the amount of formal schooling. Whereas 36.1% of those who had not proceeded beyond School Certificate or 5th Form were participants, 48.8% of those whose highest level of schooling was at the upper secondary or 6th or 7th Form level, and 64% of those who had proceeded to tertiary level education were participants.

In addition to this, it seems that the extent of the impact of formal schooling on adult participation changed markedly over the period. Figure 3.2 presents a summary of the data on those aged 16 to 64 years drawn from the 1977 DoE and 1995-96 IALS surveys. In both cases, data on full-time secondary students have been excluded.

Figure 3.2
Percentage of participants by level of formal schooling,
1977 & 1996

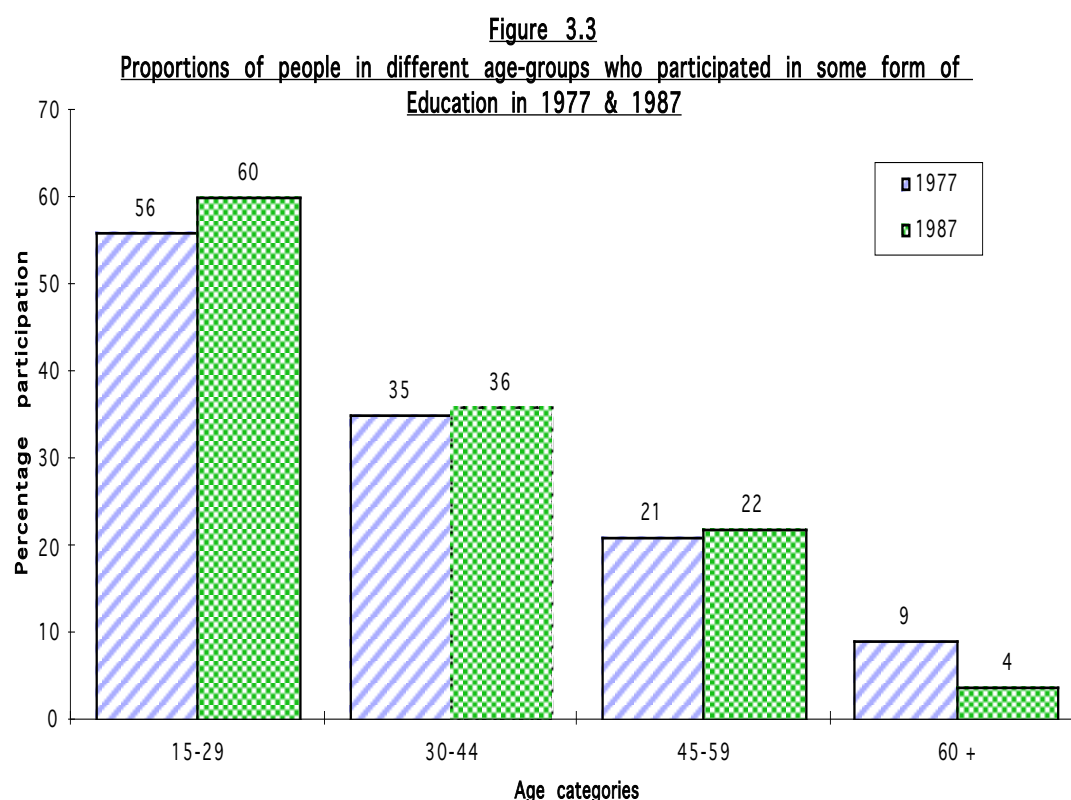


The picture presented is not surprising. In the first place, there is evidence of continuity, a continuation of the educational divide in participation rates between those with relatively little and those with extensive formal schooling. Secondly, however, the extent of this divide varies somewhat and is perhaps not as great as might have been expected. Thirdly, the nature of the divide appears to have changed somewhat over the years as an increasing proportion of the population have proceeded on to tertiary education. In 1977, the great divide was between those who had been to university, of whom over 80% had participated in the previous year, and the rest of the population, of whom less than 40% had participated. By way of contrast in 1995 this deep divide had disappeared and been replaced by a series of smaller divides. About 35% of those who had not proceeded beyond the 5th Form had participated. This compared with 52% of those with 6th or 7th Form qualifications, 60% of those who had undertaken non-university tertiary studies, and 71% of those who had studied at a university. Finally, it is important to note that the participation rates of those who had the least formal schooling remained very similar over the twenty-year period.

(d) What were the age differences between participants and non-participants? And were there any changes in the relationship between age and educational participation over the years?

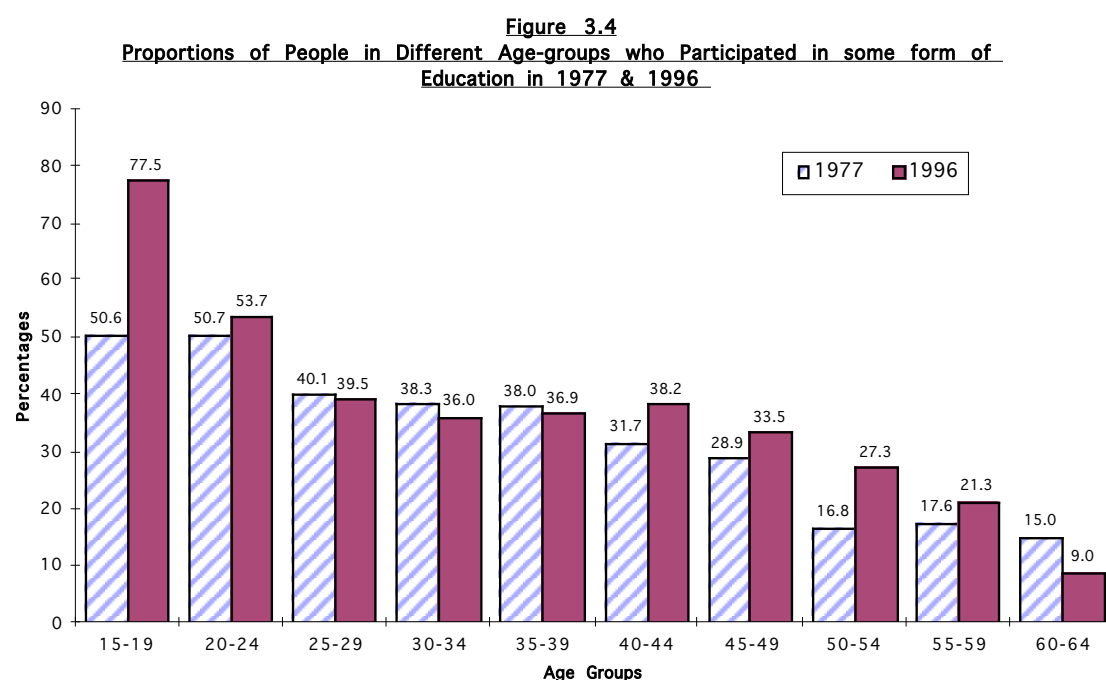
Figures 3 and 4, both of which exclude full-time secondary school students, present data which illustrate the strong relationship between age and education over the period. Each of the surveys suggests that younger adults were very much more likely to engage in educational activities than older adults. The figures also point to the fact that the largest proportionate growth in participation over the period was among younger adults, and in particular the 15-19 year age-group.

Figure 3.3 provides a comparison between the findings of the 1977 DoE and 1987 RCSP surveys. It points to sharp differences in the participation rates between age categories in both



surveys. Between 56% and 60% of 15-29 year-olds had participated in the previous year, as compared with 35-36% of 30-44 year-olds, 21-22% of 45-59 year-olds, and 4-9% of those 60 and over. One of the most striking findings here is the sharp fall-off in the participation rate of older people over the ten-year period.

Figure 3.4 provides a somewhat more fine-grained comparison of age profiles drawn from the DoE and IALS surveys. This figure points firstly to a dramatic increase in the proportion of young people proceeding on to tertiary studies over the period. In 1977 a little over 50% of 15-19 year-olds were participants; by 1996 this had grown to 77 %. In addition, there also seems to have been a very small increase in participation by 20-24 year-olds. Secondly, by way of contrast the figure suggests that participation rates among those between 25 and 39 years of



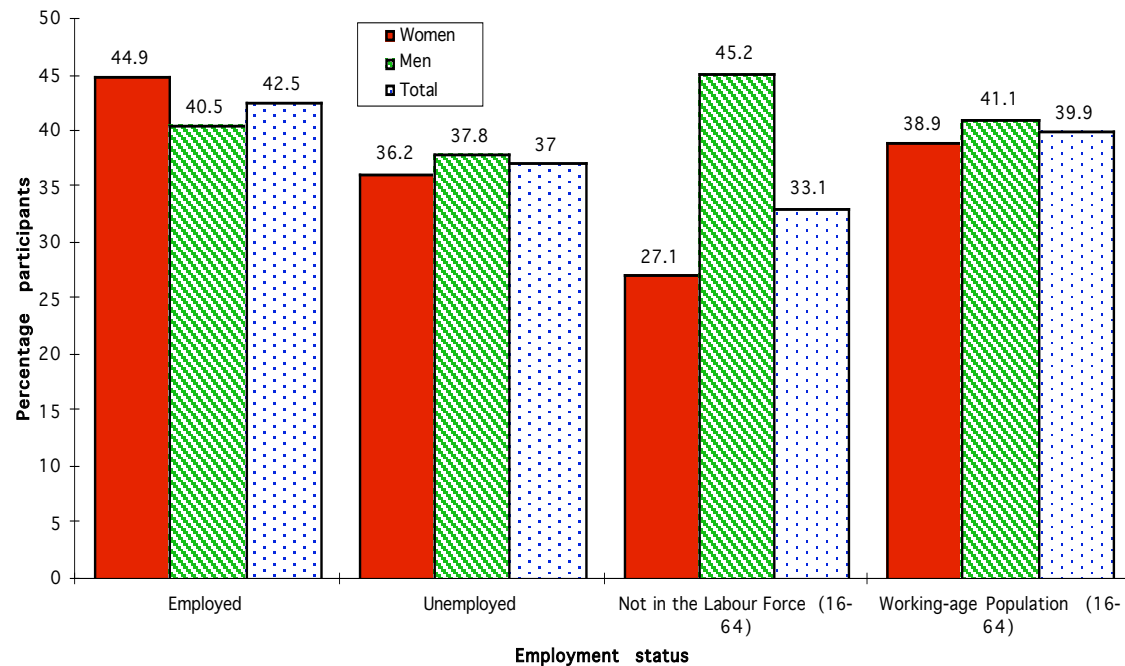
age may have fallen away slightly over the period. Thirdly, however, it seems that the rates of participation among those in their 40s and 50s may have increased markedly with the biggest increase occurring among those in the 50-54 year age-group. Fourthly, a marked drop in the rate of participation seems to have occurred among those in the 60-64 year age group in the period between 1977 and 1986.

(e) What were the occupational and employment differences between participants and non-participants? More specifically, were there any differences in participation patterns between those in paid and those not in paid employment, those working in different kinds of jobs, and those working in small and large organisations? And were there any changes in these patterns over the years?

Figure 3.5 presents data drawn from the responses of 16-64 year olds who responded to the ETS survey. It presents a picture of the differences in participation patterns between women and men who were employed and unemployed, as well as those who were not in the paid labour force in 1996. The first and perhaps most striking finding is that only 27% of women not in the paid labour force, i.e. mainly women working at home in an unpaid capacity, had

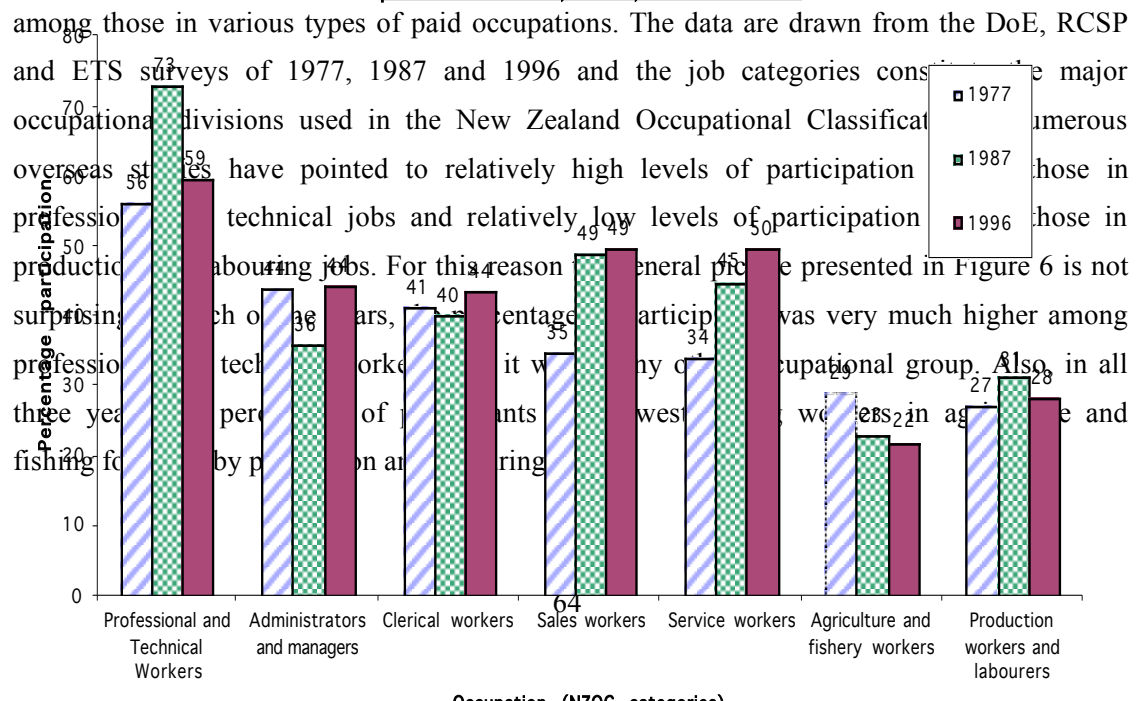
undertaken any form of education over the previous year. This proportion of participants was very much lower than among women and men who were either employed or unemployed, and it was markedly lower than the comparable figure of 45% for men.

Figure 3.5
Participation in education by employment status in the paid labour force, 1996



A second striking finding relates to the differences in participation patterns between employed and unemployed people. This difference applies to both women and men. However, the difference was greater in the case of women than it was among men. Almost 45% of women in employment had participated as against a little over 36% of unemployed women. By comparison, 40.5% of employed men had participated as against 37.8% of unemployed men.

Figure 3.6
Percentage participation in educational activities by occupational categories in paid labour force, 1977, 1987 & 1996



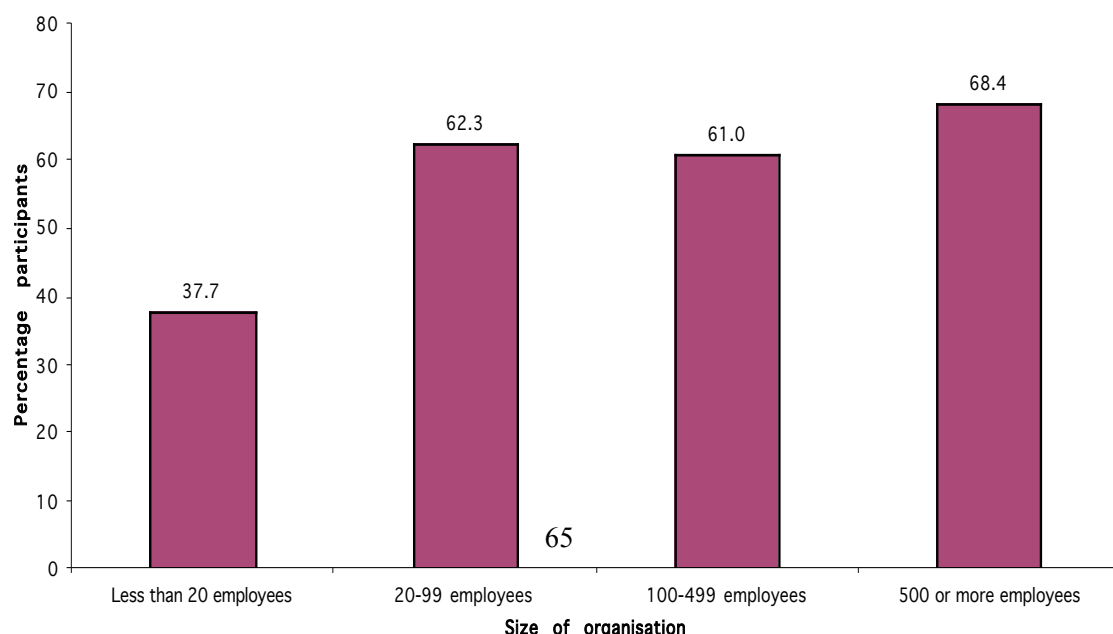
What is perhaps somewhat more surprising is that the differences in participation rates between the various job-categories were not as large as might have been expected. Overall the notion that there has been a growing divide between people in 'learning rich' occupations who are engaged in lifelong learning and those in more routinised occupations who tend not to engage in educational activities receives at best only partial support. The picture is more complex and requires closer scrutiny than we can give it here. For example, perhaps the divide applies to some forms of education and not to others. There is some qualitative evidence to suggest that much learning takes place outside the formal structures of education and training.

Also surprising are some of the different trends in participation between the various occupational categories. Between 1977 and 1987 the increase in participation by those in professional, technical, sales and service jobs is striking. This increase seems to have been sustained among sales and service workers over the following decade. However, among professional and technical workers the level of participation in 1996 was only marginally higher than it had been in 1977.

Moreover, a picture of very little change in the overall level of participation between 1977 and 1996 seems to emerge in the case of most other occupational categories as well. This includes those in administrative and managerial work as well as clerical and production and labouring work. The only exception to this is among agricultural and fisheries workers, where it seems there has been some falling away in the overall level of participation.

Figure 3.7 presents data drawn from the IALS survey, which looks at the differences in the

Figure 3.7
Percentage participation by employed adults aged 25-64 by size of employing organisation, 1996



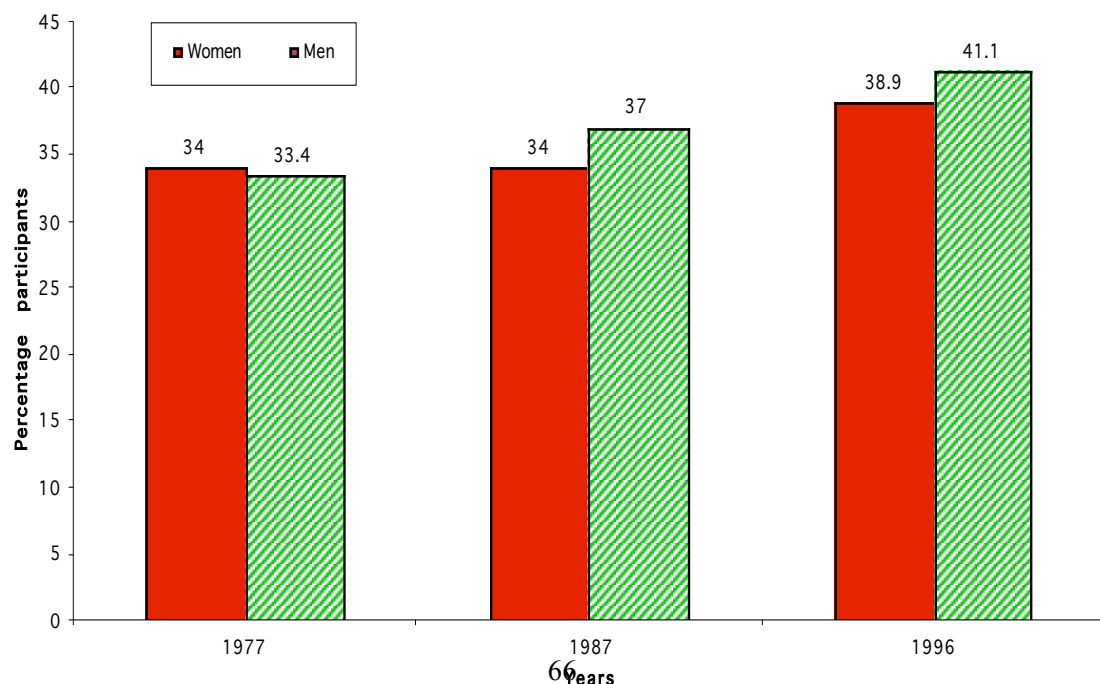
patterns of participation between those employed in small and large organisations. The sample consists only of those between 25 and 64 years of age. Perhaps not surprisingly, employees in large organisations with 500 or more employees, are very much more likely to participate in education than those in small organisations with less than 20 employees. On the other hand, it seems that there was not a major difference in the patterns of participation between employees in organisations which employed 20-99 employees and very much larger organisations.

(f) What differences (if any) were there in the patterns of educational participation between women and men? And did these patterns change over the years?

We have already looked at some of the differences in participation in relation to the employment status of women and men in 1996.

Figure 3.8 provides a picture of the overall percentage of women and men between 16 and 64 who were participants in 1977, 1987 and 1996. The data here are drawn from the DoE, RCSP and ETS surveys. It comes as no surprise to note that there was some increase in the proportions of both women and men who participated in each of the years referred to. The percentage increase was however relatively small. What may come as some surprise is the fact that the growth seems to have been greater among men than among women. In 1977, 34% of women were participants; by 1996, this had grown to 38.9%, a growth of about 5%. By way of comparison, in 1977 33.4% of men were participants. This figure grew to 37% in 1987 and to 41.1% in 1996, a growth of about 8%. In 1977, the proportion of women and men who participated in educational activities was very similar; in 1996, this had changed, and a larger

Figure 3.8
Percentage participation by women and men aged 16 to 64,
in 1977, 1987 & 1996

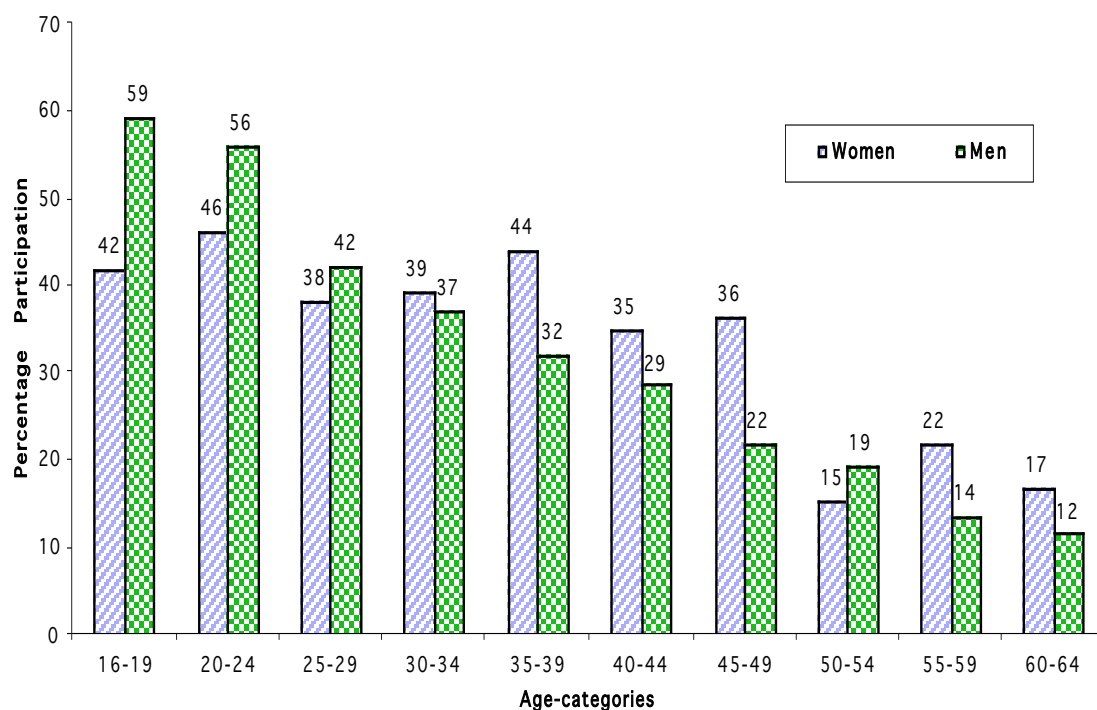


proportion of men than women had participated.

This finding, pointing to the differences in participation between women and men in 1996, is supported by the analysis of the IALS data on people aged 25-64. This suggests that 45.1% of women between 25 and 64 as against 47.8% of men participated in education or training in 1995-96. In addition, this study draws attention to the fact that whereas 34.8% of women had undertaken job-related training, 42.6% of men had done so.

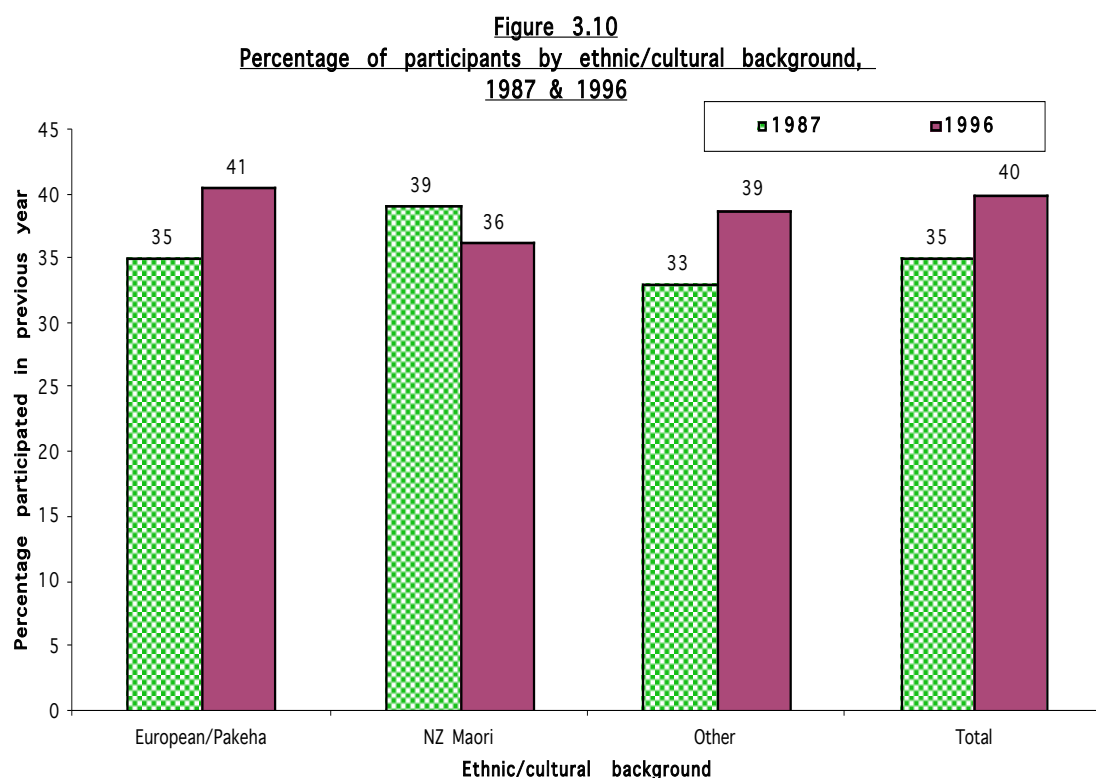
Figure 3.9 presents a summary of data drawn from the 1977 DoE survey. This provides a somewhat dated picture of the differences in patterns of educational participation by women and men at different ages. Although the data are rather old, they are the only data available at present. The differences are quite striking. The rate of participation by women remained on a plateau from the mid-teens to the late-40s, with a rate of 42% among those in their late-teens, 46% in their late-20s, 44% in their late-30s, and 36% in their late-40s, before dipping in the 50s and reaching 17% among women in their early 60s. By contrast, the rate of participation by men fell away steadily throughout their lives from a high point of 59% among men in their late-teens, 42% in their late-20s, 32% in their late-30s, 22% in their late-40s, and reaching a low point of 12% among men in their early 60s.

Figure 3.9
Percentage participation by women and men by age-category,
1977



(g) What differences (if any) were there in the patterns of educational participation between people of Maori background and those whose background is Pakeha, European or non-Maori? And did these patterns change over time?

Figure 3.10 summarises data drawn from the RCSP and ETS surveys. The data are not strictly comparable since the 1987 data include all adults 16 and over, whereas the 1996 data are for those aged 16 to 64. Nevertheless, there are some interesting and important findings. Firstly, if we look at the picture for 1987, the relatively high rate of participation by Maori is striking especially because Maori people at the time were considerably over-represented among early school-leavers and among workers in relatively routinised jobs in the fishing, forestry, agricultural and manufacturing sectors and under-represented in professional and technical jobs. In spite of this in 1987, 39% of Maori had participated in education in the previous twelve months. This compares with 35% for Pakeha/European and 33% for people from other backgrounds.



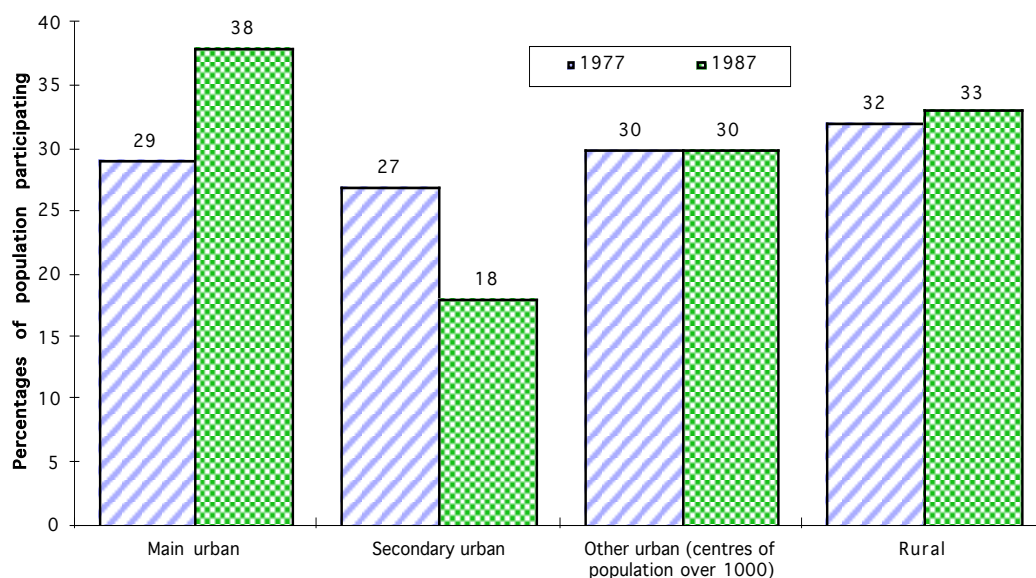
Secondly, however if we turn to the data for 1996 the picture is somewhat different. The rates

of participation by Pakeha/European and by people from other backgrounds had increased markedly to 41% and 39% respectively, whilst the Maori participation rate had fallen somewhat to 36%. One can but speculate about the causes of the unexpectedly high levels of participation by Maori in 1987 and the fall off in participation over the subsequent decade. The mid-1980s were characterised by the beginnings of a resurgence of Maori traditions and in particular, a growth in educational programmes of various kinds dedicated to teaching Maori language and cultural traditions. There was also a revival of a range of Maori art forms at the time. This cultural revival may well be reflected in the relatively high levels of educational participation in 1987. At the same time over the following decade, a relatively high proportion of Maori people remained either unemployed or employed in the marginal and increasingly low-paid kinds of jobs that remained in the immediate aftermath of the large scale restructuring of the political economy in the 1980s and early 1990s.

(h) What differences (if any) were there in the patterns of educational participation between people from rural and urban backgrounds? And did these patterns change over time?

Figure 3.11 presents a summary of the data from the 1977 DoE and 1987 RCSP surveys. The 1977 data suggests that there was at the time very little difference in the overall rates of participation between those who lived in the main urban areas, provincial centres, small towns and rural areas. In contrast with the findings in most studies overseas, the 1977 data also suggest that if there is a difference in overall participation, it favours slightly small town and rural residents over those who lived in the cities and especially the provincial centres.

Figure 3.11
Proportion of population in rural and urban areas who participated in educational activities, 1977 & 1987



By 1987, this picture seems to have changed considerably. The proportion of those who lived in the main urban centres who were participants had grown substantially from 29% in 1977 to 38% in 1987. By way of sharp contrast, the percentage of participants resident in provincial centres had fallen substantially from 27% in 1977 to 18% a decade later. On the other hand, the percentage of participants resident in small towns had remained almost constant at 30% and in rural areas it had increased marginally from 32% to 33%. It is difficult to find an explanation for these changes. The mid-1980s was a time of major economic restructuring, and both the increase in participation in the main urban areas, and the fall-off in participation in provincial centres could be related to the major dislocations which were taking place. On the other hand, small towns and rural areas were also subject to the same pressures as those of provincial centres, and in these areas, the participation rates seem to have been unaffected. Further research is clearly needed.

(i) Finally, how did New Zealand compare with other countries in terms of participation patterns? And what if any changes took place over the period?

In order to justify the large-scale restructuring of tertiary education which took place in the late 1980s and early 1990s, a number of government and other organisations argued that the levels of education participation by young adults in New Zealand in the mid-1980s were very

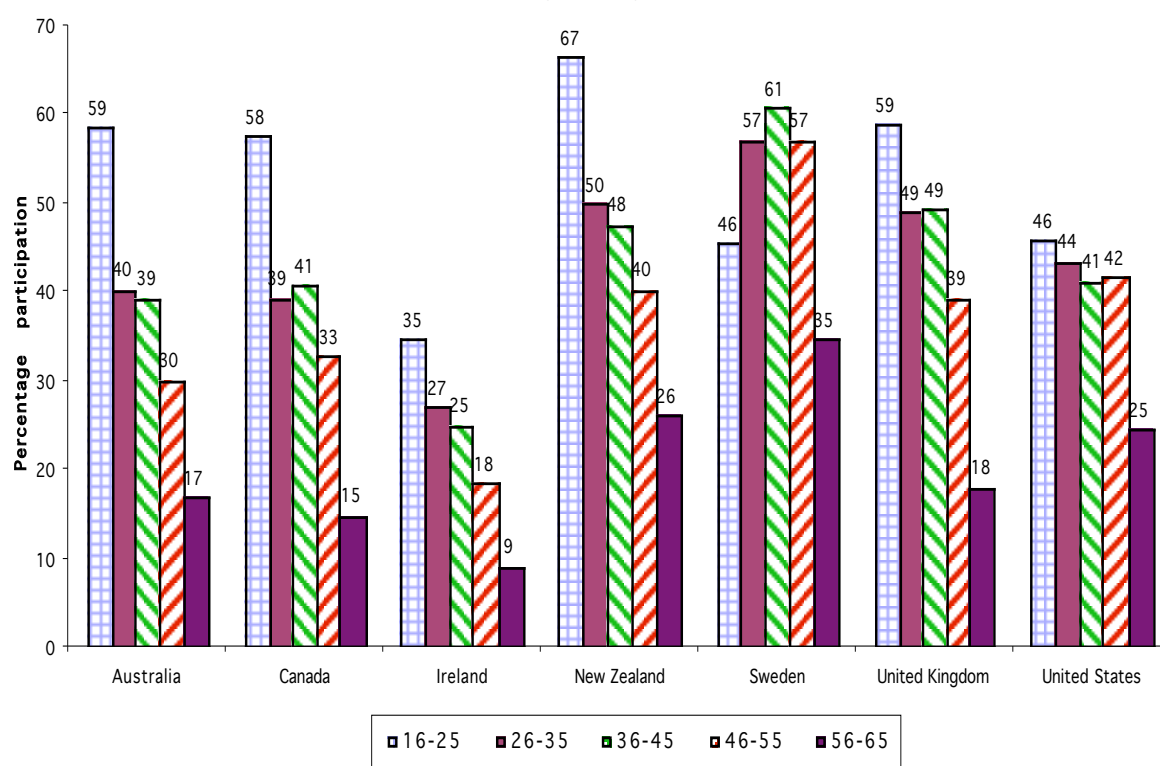
low in comparison with most other OECD countries (See for example Callister, 1990; See for example Probine & Fargher, 1987). Particular attention was drawn to the low levels of participation by 17 and 18 year-olds and to the relatively small proportion of the paid workforce with secondary and tertiary qualifications. Using OECD figures, it was concluded by some "... that our current workforce is ill equipped for the challenges of the new economy" (Paul Callister, April 1990: 17). At the time, I raised some concerns about what I saw as an over-reliance on these OECD figures (Tobias, 1991a). In particular, it seemed to me that it was a mistake to assume that those without formal qualifications were necessarily less 'skilled' than their counterparts in other countries who had qualifications. Moreover, it seemed that it would be useful to investigate the patterns of participation not only of young adults in their late-teens but also people who were older.

Before the IALS survey of the mid-1990s, however, very few studies existed to provide a basis for such international comparisons. Nevertheless, such data as were available suggested that overall participation rates in New Zealand in the 1970s and 1980s might well have compared very favourably with those in many other OECD countries. Thus, for example, estimates of the percentages of the adult population who had been educational participants in 1970/1971 in selected OECD countries were as follows: Canada - 23%; Germany - 20%; Sweden - 34% and the United Kingdom - 15% (OECD, 1977 p. 13). In addition, a study undertaken in 1972 by the Education Testing Service in the USA, which was based on a stratified national sample of people between the ages of 18 and 60, found that 31% had participated in some form of nonformal education (Gould, 1974). By comparison, as we have seen, in 1977 in New Zealand it was found that 34% of those aged 16-64 had participated, a higher rate than every other country except Sweden.

In what ways then had patterns of participation changed by the mid-1990s? The IALS survey provides the following figures on the percentages of the overall population in selected countries who had participated in education in 1994-1995: Australia - 38.8%; Canada - 37.7%; Ireland 24.3%; Netherlands - 37.4%; Poland - 13.9%; Sweden - 52.5%; United Kingdom - 43.9%; and the USA - 39.7%. By comparison, the New Zealand figure was 47.5% - the second highest rate, only exceeded by Sweden.

A further basis for comparison is provided in Figure 3.12, which draws on the same IALS database and compares the percentage of participants in the various age groups in selected countries.

Figure 3.12
Percentage of population in selected countries aged 16-65 participating in adult education, by age categories, 1994-95



Of all the countries which took part in the survey, New Zealand had the highest percentage (67%) of 16-25 year-olds who had participated in education in the previous year. In this age-group, New Zealand was followed by Australia and the UK (59% each) and Canada (58%). In all the other age-categories, Sweden had the highest proportion of participants. However, in each case, New Zealand's position was either second or third, and in every age-category the percentage of participants was markedly higher in New Zealand than in Australia and Canada.

Conclusion

This chapter has reviewed a number of methodological and substantive issues, which have arisen out of four national sample surveys of educational participation by adults conducted between the mid-1970s and mid-1990s. At a methodological level, I hope that the discussion will (a) stimulate further quantitative and qualitative studies of participation, (b) help future researchers to avoid re-inventing wheels, and (c) provide a useful basis for a move away from

‘snap-shot’ surveys toward studies which build pictures of participation trends and patterns over time (essential if we are to identify the impact of policy changes).

A wide range of substantive issues has been discussed. The chapter investigates some of the generalisations, which derive from previous studies of the relationships between educational participation by adults and such factors as their schooling, gender, age, employment status, occupation, and cultural backgrounds (See for example Benseman, 1996 p. 277). It also looks at historical trends, continuities and discontinuities in participation patterns over the twenty-year period.

In some cases, the evidence presented here merely confirms or reinforces previous findings. Older people, the unemployed, and women with dependent children for example continued to be under-represented. Moreover, schooling continued to have a major impact on educational participation, with very little change over the twenty-year period in the rate of participation by those with the least formal schooling.

On the other hand, some of the evidence, such as that on ethnicity, occupation and on urban-rural differences, contradicts, modifies or elaborates upon previous findings. Thus the evidence of the relatively high rate of participation by Maori in both 1987 and 1996, but especially in 1987, contrasts sharply with the findings of most other studies, which have painted a negative picture of the position of Maori in the educational system. This evidence emphasises the need for further research, which gives full recognition to the place of nonformal education in Maori life and learning. The chapter also draws attention to other issues. It suggests that opportunities for educational participation are likely to be greater the larger the organisation for which one works. In addition, although the evidence confirms a relatively high level of participation among those in professional and technical jobs and a relatively low level of participation among those in production and labouring jobs, the differences in participation rates between the various job-categories were not as large as might have been expected. The picture is more complex than is sometimes suggested. It would seem that people in more highly paid managerial and administrative jobs have not necessarily been more likely to participate in education than those employed in clerical, sales and service work over the period. Moreover, the white-collar/blue-collar participation divide does not appear to have been as large as has sometimes been implied. In addition, by way of contrast with the findings of many studies in North America and elsewhere, many of which have suggested that educational participation is predominantly a feature of urban rather than rural societies, the evidence of this study points to relatively high rates of participation in rural areas.

The chapter also looks at some key historical trends, some continuities and discontinuities

over the twenty-year period. In the first place, although the evidence suggests that there was an increase in the proportion of people engaging in educational activities between the mid-1970s and mid-1990s, this increase of around 10%, may not have been as large as has sometimes been implied (See for example Ministry of Education, 1997b p. 9; Ministry of Education / Te Tahuhu o te Matauranga, 2000 p. 30). What appears to have happened is that participation in formal tertiary education increased considerably, while participation in educational programmes oriented to the arts and crafts, and cultural, political and social objectives fell away equally significantly.

Secondly, although the evidence suggests that there was a substantial increase in the number and proportion of young adults, especially those in their late-teens and early 20s, moving into tertiary studies, and some increase in rates of participation among people in their 40s and early 50s; at the same time, it seems that the proportion of older people participating in adult education fell away quite sharply. Thirdly, although it seems that the participation rates of both women and men increased over the period, and in particular, in the late-1980s and early-1990s, the rate of participation by men increased more substantially than that of women. Whereas in 1977 more women than men were participants, by 1996 this had been reversed with a higher rate of participation by men than women.

Fourthly, although the evidence suggests the continuation of the 'divide' in educational participation rates between those with relatively little and those with extensive formal schooling, the extent and nature of this divide appears to have changed somewhat over the period. In 1977, the great divide was between those who had been to university, of whom, over 80% had participated in the previous year, and the rest of the population, of whom less than 40% had participated. By way of contrast, by 1995 this deep divide had disappeared and been replaced by a series of smaller breaks. These ranged from a participation rate of 71% by those who had studied at university to 60% of those who had undertaken non-university tertiary studies and 52% of those with 6th or 7th Form qualifications, while only about 35% of those who had not proceeded beyond the 5th Form had participated.

Finally, the chapter has reviewed some of the findings drawing attention to comparative data on educational participation. In spite of the lack of recognition of many of the historical achievements in the field of adult learning in Aotearoa in much of the literature and in particular in many policy documents issued by the state, participation rates in both 1977 and 1996 compared very favourably with those in most other OECD countries. Overall, it seems then that the period was marked by a rise of instrumentalism and greater pressures towards credentialism. The data suggest that it was the strengthening of these factors rather than any overall growth in participation that was the most significant feature of the period.

Chapter 5¹

Who needs education or training?

Learning experiences and perspectives of adults from working class backgrounds

Introduction

The previous chapter was grounded in the strong tradition of social survey research dating back to the early years of the twentieth century. This chapter, however, is strongly critical of that tradition. By contrast, it is grounded in ethnographic and qualitative traditions, which raise important questions about the validity of many of the categories and concepts used in the kind of research discussed in the previous chapter. This chapter attempts to throw light on the learning experiences and perspectives of people from working class backgrounds with little formal post-compulsory education. It does so by highlighting the use of qualitative methods and by featuring case studies based on in-depth interviews with a small sample of adults. My hope is that the juxtaposition of these two chapters will provide fresh understandings not only of a number of substantive issues of participation, but also of a number of methodological issues.

Historical contexts

'Is lifelong adult education a guarantee of permanent inadequacy?' This was the question posed by John Ohliger (1974) twenty-eight years ago in an address to an international conference held in Mexico. In responding affirmatively to his own question, he argued that adult education in North America was becoming an oppressive force that was beginning to take over people's lives. He also raised questions concerning the technocratic assumptions underlying the vision of an international learning society as promoted in UNESCO's much praised report entitled 'Learning to be' (Faure, 1972).

At the very time that Ohliger was writing in the mid-1970s, a sustained period of capital accumulation and economic growth in Aotearoa New Zealand, as well as in many other industrialised countries, was coming to an end. The late-1970s and 1980s saw the political defeat of social democratic and reformist governments in a number of countries, and the rise to power of conservative governments driven by revitalised neo-liberal economic doctrines. In the late-1980s and early 1990s, these doctrines and the radical individualistic ideologies on which they were grounded were strengthened further by the collapse of the communist regimes in the Soviet Union and Eastern Europe. In many countries, including Aotearoa/New

Zealand, the welfare state came under increasing attack on both equity and efficiency grounds, as neoliberal ideologues sought to privatise state assets and services, and the gaps between rich and poor both within countries and internationally continued to grow (See Kelsey, 1995).

In the light of these changes, the principles of lifelong learning and adult education were reshaped to meet the requirements of the global market and the new 'enterprise culture' (See Tobias, 1997a; and Tobias, 1999). In this economic and political climate, the pressures on young people and adults in many parts of the world to continue their education and training and to extend their search for credentials have continued to grow. In addition, in the new 'enterprise culture', employers and private providers have come to be seen by many governments as more cost-effective agencies of adult education and training than traditional public educational institutions. Moreover, non-governmental organisations and community groups engaged in adult education have come to be seen as agencies to receive state funding only to the extent that they serve the narrowly proscribed welfarist or labour market requirements of the state.

Patterns of participation

In the light of the pressures referred to above, it is not surprising to note, as we did in the previous chapter, that the number and proportion of adults participating in educational activities has increased significantly in many countries in recent years. In Aotearoa/New Zealand, national sample surveys suggest that the proportion of the population between 16 and 65 who had participated in some form of education over a 12-month period increased from 34% in 1978 to 47.5% in 1994-95 (See the previous chapter as well as Bird & Fenwick, 1981; Ministry of Education / Te Tahuhu o te Matauranga, 2000; OECD, 1997). From a sociological perspective, it may be argued that this reflects in part the increasing use of education and credentialing as ostensibly neutral, rational and objective mechanisms by means of which the middle class continues to construct and maintain itself as a class.

For many years it has been noted that adult education is primarily a middle class activity serving largely middle class interests (Benseman, 1979); and considerable research evidence (See for example Benseman, 1992, 1996; Courtney, 1992; McGivney, 1990, 1993; Thompson, 2000; C. A. Torres, 1990; Youngman, 2000) suggests that class, gender and race, together with a number of other factors, have had a significant impact on the extent and nature of participation by adults in all forms of learning and education. A relatively small proportion of working-class adults participates in education. Hedoux (cited by McGivney, 1993 pp. 13-14),

¹ This chapter is based on an article published in *Studies in the Education of Adults*, 30 (2) October 1998. I am grateful to the editor and publisher for permission to draw on this article.

in a French study published in 1982, found that those people from working class communities who did participate comprised an 'active social minority' characterised by better material circumstances, greater mobility, and higher levels of initial schooling than others in their communities. He also found that participants were generally leading a more diverse and intense social life than non-participants, and tended to be more involved in voluntary groups, political parties, unions, churches, and local cultural activities.

These findings are similar to those of a very large number of other studies undertaken in many countries of the world over the past thirty years. Overall, the evidence suggests that, irrespective of location or educational setting, adults from certain sections of the community tend to participate minimally in any form of educational activity. These include working-class people in general, and more particularly people in low paid or subsistence jobs or who have been unemployed for extended periods, people with little formal schooling, older adults and women with dependent children from working-class backgrounds, ethnic minorities and others whose cultural traditions have been subordinated or suppressed. In addition, a number of psychological studies have investigated motivational orientations and other factors affecting adults' participation in education (See R. Boshier, 1989; See R. Boshier & Collins, 1983; R. Boshier & Collins, 1984) and the barriers or deterrents to participation (See Darkenwald & Valentine, 1985; Hayes & Darkenwald, 1988; Scanlon, 1984; Valentine & Darkenwald, 1990).

Rationale and purposes of this study

Despite what some have seen as the pre-occupation of adult education researchers with issues of participation and non-participation (See Harré Hindmarsh & Davies, 1995), very little qualitative or ethnographic research has been done to investigate the experiences, interests, views and perspectives on learning and education of adults with little or no experience of formal post-compulsory education i.e. the 'non-participants'. Similarly, very little sociologically informed research has been done to investigate the historical and biographical processes through which class, gender, race and other forces serve to structure the post-compulsory learning and educational patterns, experiences, interests, views and perspectives of adults from working class backgrounds.

There are, nevertheless, a few studies which have begun to inform alternative theoretical and policy discourses on participation (Crowther, 2000; Tight, 1998) and to shape alternative research traditions. In the early 1980s, an influential article by Kathleen Rockhill (1982) challenged the positivist and quantitative approaches that had dominated North American participation research. She argued that the search for scientific precision might well result in a loss of human perspectives and that the search for reliability and generalizability may result in

a loss of construct validity and meaning. In particular, she pointed out that much research treats educational participation "as a dichotomous event which does or does not take place", and then proceeds to categorise non-participants 'as non-learners' (1982, pp 6-7). Both these notions, she argues, are false. Definitions of education, learning and participation are social, cultural and political constructs developed by researchers, educators, administrators and politicians to serve a variety of purposes (See for example Tobias, 1992, 1996). They are imposed externally on the lives of people, very often with little effort being made to understand the ways in which the people being researched, educated or administered organise or make sense of their own lives. Instead, Rockhill advocates a qualitative approach to research on participation in which:

emphasis is placed upon the importance of understanding the meaning of participation in the life-world of the individual, where educational participation is considered within the broader context of learning, and learning is viewed as embedded in the life-world (1982, p 3).

Arlene Fingeret (1983) spent twelve months engaged in participant observation and in-depth unstructured interviews with 43 illiterate adults in a North American city in order to explore their social worlds and the part that illiteracy played in their lives. Her findings challenge the 'deficit' perspective, which, she argues, characterises much work in adult basic education. She shows that most illiterate adults create social networks that include readers; that these networks are characterised by mutuality and interdependence rather than subordination and dependency; and that most illiterate adults contribute a wide range of skills and knowledge to these networks. She shows further that whilst some illiterate adults do see themselves as having little or nothing to contribute to their networks and hence may be viewed as dependent, their lack of education and illiteracy is not the underlying cause of the dependency, although it may contribute to this condition.

Wendy Luttrell (1989) based her study on participant observation and in-depth unstructured interviews with more than 200 working class women participating in two different adult basic education programmes, one in the northeastern and the other in the southeastern part of the U.S.A.. She then selected 30 of these women, half of whom were black and half were white, for further interviews. Her focus was on understanding the ways in which black and white working class women think about learning and knowing, and she reveals some of the complex ways in which gender, racial and class relations of power affect these 'ways of knowing'. In particular, for the purpose of this chapter, she shows how the women made a clear distinction between common sense knowledge and 'real' intelligence, which 'stems from experience and is judged by people's ability to cope with everyday problems in the everyday world' (Luttrell, 1989, p 37), and 'schoolwise knowledge' acquired through formal schooling and 'schoolwise

intelligence' which is the kind of intelligence exercised by professional and academic people.

The women thought that:

although schoolwise intelligence can enhance one's life, it can also interfere with one's ability to meet the demands of working-class existence; they suggested that the more schooling one has, the less common sense she is likely to have (Luttrell, 1989, p 38).

Luttrell suggests that by distinguishing between the two types of intelligence, common sense and schoolwise intelligence, they came to believe that it was schoolwise intelligence rather than class that determines a person's place in the social structure. Through this, they came to embrace:

the dominant ideology of meritocracy in a capitalist society: people's class position is not fixed but is determined by their individual efforts and ambitions ... In the end, the women accepted class stratification and relations of domination through the false dichotomy of common sense and intelligence and through class-based notions of 'real intelligence' (Luttrell, 1989, p 38).

In Aotearoa in the late-1980s, John Benseman (1989) undertook a qualitative study to investigate how a group of adults with limited formal schooling viewed their experiences of education and the opportunities open to them as adults. He undertook semi-structured in-depth interviews with forty members of the Hotel, Hospital and Restaurant Workers' Union, most of whom had left school at the minimum legal school-leaving age and had little if any experience of formal education since leaving school. On the basis of these interviews, he identified five predominant conceptions of education that emerged from the discussions of schooling. Education was seen as '... synonymous with schooling; ... geared for the talented/Pakeha/males; ... the key to better jobs and life-styles; ... a phase of life to be endured; (and) ... a competitive enterprise with lifelong rewards for those who succeed' (1989, p 137). Overwhelmingly, education was seen in highly individualistic, competitive terms as 'synonymous with jobs. More schooling/qualifications means a greater choice of jobs; less schooling/qualifications means being less competitive in an ever-decreasing job market ...' (1989, p 148).

A further key study in the qualitative tradition was that undertaken by Linden West (1995; 1996) in the U.K. between 1992 and 1995. Unlike the previous studies referred to above, which had for the most part drawn on 'non-participants' or those with little or no experience of postcompulsory education, West drew his sample from among adult students who had decided that they wished to undertake university studies. All of the thirty interviewees had begun an Access or Foundation programme before their first interview, and most went on to undertake

degree studies, whilst still participating in the ongoing indepth interviews.

The focus of West's study was on adult motivation in education, and more specifically on "... why adults want to enter and continue in higher education at particular stages in their lives and what participation represents to them in the context of the past, present and desired futures" (1996, p ix). He argues that many of the misunderstandings of adult motivation have arisen because learners themselves have rarely been encouraged to reflect, in a flexible and longitudinal way, on their reasons for educational participation and learning in the context of past as well as present lives" (1996, p 1). He argues further that human motives are complex and subtle, that "we are all to an extent scripted by culture" and may not be aware of many of the forces that shape our actions (1996, p 5), that the distinction frequently drawn between vocational and personal motives for learning is artificial and reductionist (1996, p 206), and that the experiences of adult learners may be understood as constituting part of:

individuals' struggles for self within subjective and cultural dialectics in which inner lives and the confidence to take risks are shaped by important others as well as social situations, the past and the present (1996, p 207).

The aim of the study reported on in this chapter is to build on this growing body of research. By way of contrast with the study by West, this chapter draws its findings from in-depth interviews with a small sample of 'non-participants' in formal post-compulsory education. Its aim is to contribute to our understanding of:

- the ways in which people with little or no experience of formal post-compulsory or tertiary education perceive their own learning and education as well as that of 'significant others' in their lives; and
- the forces and experiences from childhood through to adulthood that shape the different perceptions, interests and attitudes toward different kinds of learning and education.

Methodology

To achieve these aims, as well as to provide students in adult education with an opportunity to undertake an interesting and illuminating project, since 1992 I have required students on one of my courses to undertake two in-depth interviews with people from working-class backgrounds. The purpose of these interviews has been to explore the lives, learning experiences and perspectives of people from working class backgrounds who had left school at the minimum school-leaving age. More particularly the focus has been on comparing the lives, learning experiences and perspectives of people from working class backgrounds who have participated in education as adults with those who would generally be seen as non-

participants.

Each year, following a review of the literature on participation and non-participation, attention has focused on the limited number of theoretical, qualitative and ethnographic studies that seemed pertinent to our project. These studies by Houle (1961), Tough (1979), Head (1977), Willis (1979), (Westwood, 1984), Weil (1986; 1989), Quigley (1990), Deem (Deem, 1993), (Stalker, 1993), Cocklin (1990; 1996), (Garrick, 1998), Bond (1999), (Jackson & Jordan, 2000), (Howell, Carter, & Schied, 2002), and Alheit (1994a; 1994b) as well as those referred to above have informed our thinking about the research problem as well as our research methodology.

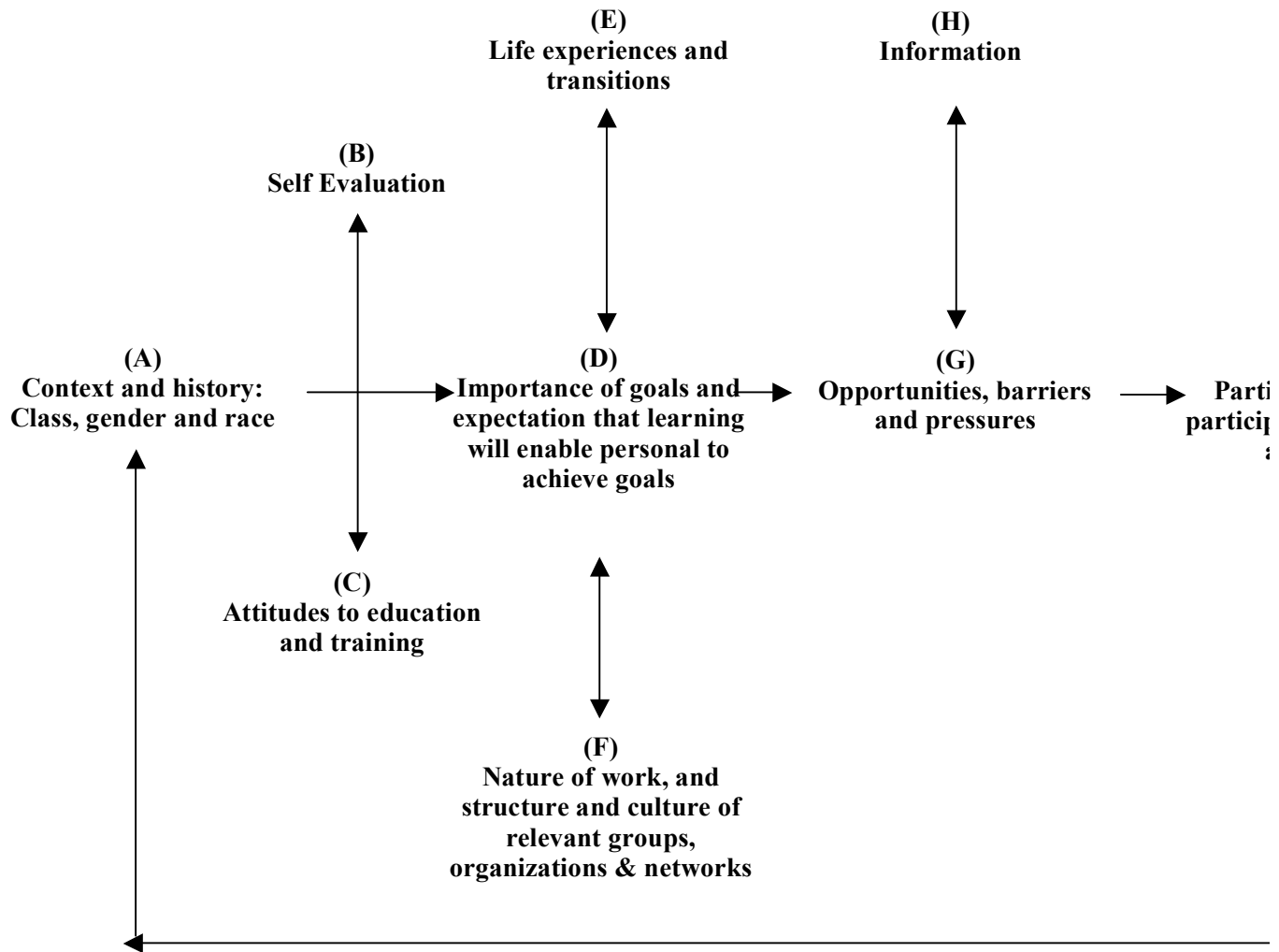
Patton (1990) discusses three approaches to qualitative interviewing: the informal conversational interview, the general interview guide approach, and the standardised open-ended interview. The informal conversational interview, which typically occurs as part of ongoing participant observation, " ... relies entirely on the spontaneous generation of questions in the natural flow of interaction" (1990, p 280). The general interview guide approach, which is very much more highly structured than the informal conversational interview, seeks to ensure " ... that basically the same information is obtained from a number of people by covering the same material. The interview guide provides topics or subject areas within which the interviewer is free to explore, probe, and ask questions that will elucidate and illuminate that particular subject. Thus the interviewer remains free to build a conversation within a particular subject area, to word questions spontaneously, and to establish a conversational style - but with the focus on a particular subject that has been predetermined" (1990, p 283). The standardised open-ended interview schedule is even more tightly structured than the general interview guide. Patton states that, "The basic purpose of the standardized open-ended interview is to minimize interviewer effects by asking the same question of each respondent" (1990, p 285). The precise sequence and wording of each question is determined in advance of interviewing, generally after careful consideration and pretesting of the interview schedule. In view of this, although interviewees are free to respond in their own ways to the questions, interviewers are generally not free to depart from the predetermined sequence or wording of the schedule.

An interview guide approach was adopted for this project, and over the years, students have contributed to both the formulation of the research problem and the development of the interview schedule. The initial interview schedule reflected some of the kinds of questions that arise out of Cross' (1982) 'chain of response' model of adult motivation for learning. However, this model was rapidly extended and adapted (see figure 4.1 below) in an effort to incorporate questions arising out of a more comprehensive sociological framework.

Figure 4.1

TOWARD A MODEL OF ADULT MOTIVATION FOR LEARNING

(Adapted by Robert Tobias from the "Chain of Response" model in K. Patricia Cross,
Adults as Learners,
Jossey-Bass, San Francisco, 1982: 109-152)



The schedule thus includes questions covering the following general areas:

- Background information on the interviewees, including their reflections on their childhood, teenage and adult years - their schooling, home life and occupations - and on their families of origin;
- Information and interviewees' perspectives on their interests, organisational and group memberships, and change events;
- Information and reflections of interviewees on their experiences of learning in their childhood, teenage and adult years; and
- Interviewees' perceptions of the most important influences on their lives and patterns of learning as children, teenagers and as adults.

One of the major problems confronting any researcher undertaking this kind of study is that of identifying and gaining access to an appropriate sample of people to interview. In his report on a study of youth unemployment, Peter Alheit (1994b) points to one aspect of the problem. Originally, he planned to interview a subgroup of young people who had been unemployed for longer than two years. However:

Our search for such informants remained unsuccessful, until we realized that the flood of 'schemes' that the young unemployed were being pushed into - often against their will - was preventing any 'statistical' long-term unemployment, even though the social problem was not removed in the slightest by these schemes. Such experience compelled us to see the phenomenon of youth unemployment as a multiple syndrome and not as an easily isolated variable (1994b p. xi).

In a similar fashion, identifying and gaining interview access to a category of people, i.e. 'non-participants in post-compulsory and adult education', which might or might not exist, or which might exist merely as a residual statistical category, is highly problematical. In recognition of this problem, students have simply been asked to do their best to find people to interview who were 25 or older, who had left school at the minimum legal school-leaving age or younger, who had participated in little if any formal postcompulsory education, and whose parents also had minimal schooling and were in working-class jobs.

No attempt was made in this study to randomise sample selection. Nor was it possible to emulate the participant observation methods used by Fingeret (1983) and Luttrell (1989) or the reflexive life history methods used by West (1995; 1996). The interviews, which have varied in length from 40 to 120 minutes, have been tape-recorded and at least partly transcribed. Where necessary, information from the interviews has been supplemented by means of informal follow-up conversations with the interviewees. In addition, in several instances

interviewees have taken up offers by interviewers to reflect with them informally on the content and process of the interview. The procedures adopted in undertaking the project have conformed with the guidelines established by the Human Ethics Committee of the University of Canterbury, which has given its approval to the project. The anonymity of the interviewees has been secured by the use of pseudonyms and by the removal or alteration of any information that might enable anyone to identify them. In addition, their written permission has been obtained to use the information for research purposes.

For the purpose of this chapter, I have drawn on material from seven reports, as well as on information from the tape-recordings of interviews where these were available, in order to construct the case-studies presented below. These case-studies were chosen for a number of reasons, the most important of which were that: all the interviewees were from working-class backgrounds; all left school at the statutory minimum school-leaving age or younger with no formal qualifications; and all had parents with minimal secondary schooling and no formal educational qualifications. In addition to these common factors, it seemed important, for the first of what I hope will be a number of studies, to present a picture of diversity. Hence, the case-studies presented are of women and men with very varied life experience whose ages range from the late 20s to the late-60s. It is important to note however that no Maori are included in this sample of case-studies. The presentation of Maori accounts of their experiences and perspectives remains a task for a future publication.

I am most grateful to the following for permission to use materials from their reports: Lesley MacGibbon (1995), Lillian Glasson (1995), Chris Kjelgaard (1992), Merryn Dunmill (1994), Helen Lamb (1995), Cynthia Stokes (1994) and Hazel Phillips (1994). I am also most grateful to the interviewees for allowing us to use the information that they provided for research purposes.

Case Studies

Joan is a woman in her late-60s, born in the mid-1920s in a small town on the East Coast of the South Island where she lived all her childhood. Her parents had little schooling; her mother worked at home on a farm and then as a waitress before marriage; her father, 10 years older than her mother, worked as a labourer. Joan attended the local primary school until the end of standard 6 when she left school to work in the woollen mills. Until recently most children from working class backgrounds had left school in standard 6, and Joan's two brothers and her sister all left school at the same age. In the mid-1930s, only a year or two before Joan reached standard 6, the Proficiency Examination, which had served as a barrier to secondary schooling for many working class youngsters, was abolished. As a consequence of this, more young

people from working class backgrounds were continuing on to secondary school. Most of her friends went on to high school, as did all her class-mates, but her parents 'just didn't have enough money. They did their best, but they were too old and weary'. She did not object to working at the mills: she enjoyed earning her own money and the older staff looked after her. In addition, several people in the local church encouraged her to take on responsibilities and the local librarian guided her reading.

After 3 years at the mills and a further year working as a waitress, she started work as a nurse aid at a TB sanatorium. After 5 years of nurse aiding she decided that she enjoyed nursing and applied for admission to a nurse training programme. She was rejected on the grounds that she had no secondary schooling or qualifications. However, with the support of the matron at the sanatorium, who admired her enthusiasm and willingness to learn, she was eventually accepted 'through the backdoor' for training at a small country hospital. Three years later she graduated as a nurse. She says that:

Somehow that informal education (that she had received since leaving school) must have done me a lot of good because I went into a class of 40 and there was one other person who didn't have secondary education, and I was the only one in that class who got honours. That was some credit to that sort of education.

Over the next few years, Joan progressed up the nursing ladder from staff nurse to ward sister, and then to nursing tutor. Her learning during this time was practical and hospital-based. In the mid-1950s, she enrolled at the Nurses' Postgraduate School, and after one year gained a Nurses' Postgraduate Diploma, the highest qualification in nursing at the time. Despite all this, Joan said that she always felt conscious of her lack of secondary education and disadvantaged in educational terms.

She married in the 1950s, and 'as was usual at the time' when she married she gave up paid work. However, she found a whole new world of learning awaiting her with the arrival of children. She became involved in the local Plunket Society, a voluntary organisation providing health services for infants, play centre and school committees and then had several part-time jobs. In addition, she has been actively involved in the girl guides movement, the Citizens' Advice Bureau, and in running a group for intellectually handicapped children for two years. Learning and education has been a central focus of her life. Perhaps because she left school early, she says she has been 'wanting education in everything I've done'. She has thus been a regular member of a wide range of non-formal educational groups and classes offered by the WEA, schools and the university centre for continuing education, and with her husband, a businessman who also left school early, has done a good deal of travel, always with an educational focus. In her retirement, despite being nearly blind and having had surgery for

cancer, she is still an active learner and citizen. She uses the library regularly and is a regular radio listener; she is involved in meetings and marches to protest at changes to the health system; and is an active member of several other groups including Probus, a service club for older people.

Overall, she feels that her lack of secondary education has driven her to pursue education and learning all her life; and in this search for education, she feels that she has been fortunate in being influenced by people who encouraged and nurtured her. She states that 'I have all my life been exceedingly lucky; people have influenced me in positive ways'.

Shirley, a woman in her late-50s, is a widow with four grown-up sons, the youngest of whom is still living at home. She was born in the late-1930s also in a small town in the South Island, where she lived all her childhood. Her father was a plumber and her mother, a homemaker. Neither parent had attended secondary school, and neither appears to have seen themselves as having any role in encouraging or discouraging their children in their schooling and education. The family struggled financially 'to make ends meet'. Shirley's mother encouraged her to make things:

... there wasn't money to buy things so we made whatever we wanted ... she encouraged me to do that ... mostly my own clothes - she taught me to sew, taught me to take care of the house ... how to make ends meet, budget, that would have stood by me mostly.

Her father's influence, on the other hand, appears to have been mainly negative. 'He was a man who drank too much. I was probably mostly afraid of him'. This seems to have affected her lack of confidence in later life. There was twelve years difference between herself and her two older siblings. She therefore grew up very much on her own. Her sister became a nurse and her brother worked for the railways as a clerk.

Shirley's experience of school was not a positive one - school was 'something I didn't particularly enjoy'. She felt that it did not influence her life much. She said that school did not offer the subjects - homecrafts - she wanted to do. She therefore lost interest and felt that she wasn't getting anywhere, 'so I got to the stage where I just wanted to get on with my life and do it my way'. She therefore left school when she was fifteen without any qualifications, and got a job. She describes her first jobs:

In a hotel in the town. It was pantrymaid, waitressing, housemaid - something that I enjoyed ... I had that job 'til I left ... , then came to Christchurch and worked in a small factory with my aunty, making slippers, toys and bags ... From there I was married, shortly after that particular job.

She identifies her main occupation since then as that of a homemaker and caregiver to her husband and four sons. Shirley has in fact been married three times. Her first husband was a carpenter, and her second husband, to whom she was married for twenty years until his death about six years ago, was a nurse. Five years ago, while still working through her grief following her husband's death, she married for a third time - a brief but 'disastrous' marriage.

Her main interests over the past 15 to 18 years have been in collecting and restoring old dolls and miniatures and more recently teddy bears. These interests she dates back to her childhood years when she spent much of her time amusing herself with her dolls. However, they began to take their present form about 18 years ago when she was asked by a friend to a meeting of the doll club. She then began to collect old dolls, mainly by attending garage sales, which she enjoys, and increasingly developed a high level of skill in restoring them. She sees herself as almost entirely self-taught, preferring to learn and work on her own or with a friend or two rather than in large groups. In fact, she has worked almost entirely on her own, using books to help her and experimenting with the different doll parts and with mixing paints. Her skills in making miniatures have also developed in a similar fashion. She now has a stall at a market and gets in a good deal of doll restoration work from the dolls' hospital and from other sources. Her advice is widely sought especially in the restoration of composition dolls from the 1920s and 1930s.

Over the years the support she has received from friends as well as the successes she has had in running her market stall and especially in doll restoration have increased her self-confidence, though her disastrous marriage also taught her to be more wary and less trusting in others than she had been previously. In addition to her other interests, she now enjoys regular walking and tramping on her own or with a friend rather than as a member of a tramping club.

Alfred, a man in his late-50s, was born in the late-1930s. He lives in Christchurch, is married and has three grown-up children - two girls and a boy - and several grandchildren. He was born on the West Coast of the South Island in a region of scattered population, and spent his early years there. However, by the time that he was old enough to go to school his family had moved to Christchurch.

Alfred's father was a gardener and his mother combined the tasks of homemaking - they had six children - with work as a machinist. Neither of his parents had secondary schooling, and neither had any formal qualifications. Neither parent knew much about school, nor were they in a position to contribute much to their children's schooling. Alfred himself left school when he was twelve with no qualifications at a time when the compulsory school-leaving age had

been raised to fifteen and when most young people were going on to secondary school. During his relatively short period of schooling, Alfred moved schools several times as his family moved around Christchurch in search of employment. He recalls being classified as a 'slow learner' and he also says that there were 'too many in the class to learn', so that he never learned to read.

On leaving school, he got a labouring job at a brewery for several years before getting married when he was nineteen. He and his wife then moved back to the West Coast where they worked together as farmhands for ten years. They then returned to Christchurch and with his wife's help he set up his own car wrecking business, which they ran for twenty years. He remains interested in old cars, car parts and car wrecking as a hobby. However for the past nine years his main occupation has been as a cleaner, and he continues to work with his wife both in cleaning and in the small private business where she works as a bookkeeper and where she organises him on the job. His main interests are his family and particularly his grandchildren. He really enjoys his granddaughter who 'comes around and teaches me the right way to do things'. He also takes an interest in his wife's involvement in the Clothing Workers' Union.

Never having learned to read, throughout his life he has relied on his wife to read for him, to drive – despite his interest in cars he never got a driver's license - and to 'organise things'. They have always 'worked to survive'. Since leaving school, he has undertaken no organised education or training. Nor has he been involved in any voluntary organisations. He does think that education is very important. However, he sees himself as a 'plodder'. He feels that he hasn't 'had the schooling to advance myself' and would be too nervous to try to go back. Nevertheless, he says that he loves learning things and says that he learns something new every day by listening to people and letting them show him the way to do things.

Dan is a man in his early 50s who was born in England in 1946. He moved to New Zealand with his parents, three older brothers and one older sister when he was still a youngster. Since then, he has lived in various parts of Christchurch. Dan is married and has two children, both girls, aged 20 and 17, who still live at home.

Dan's father was a piano tuner and his mother he describes as a 'housewife'. He does not know at what ages they left school. Although neither parent had any formal educational qualifications, his father had served his apprenticeship. Dan feels that his father was a very strong role model for him: 'He was a gentleman in every sense of the word'. However 'he was old enough to be my grandfather' and did not encourage Dan in any particular direction. His mother, on the other hand, did encourage him: she was an extrovert who involved all her

children in her love of music and entertaining. Dan learned to play the guitar, and he and his siblings were called on frequently to take part in their mother's productions, which she put on at institutions around the town. Neither parent was particularly knowledgeable about or took much interest in their children's schooling.

Dan was always 'a bit of a loner' and found informal social contact difficult. Recently he had a breakdown, and in the course of extensive counselling discovered that he had been sexually abused as a child. He attributes his social awkwardness throughout most of his life to this. Dan's experience of schooling was mixed. He did well in his early years, but gradually lost enthusiasm:

My early reports were quite promising. I was quite enthusiastic. But I went to so many schools I just lost interest, and by the time I got to secondary school I had just had enough.

He left school in his fourth form year when he was fifteen, at the compulsory school-leaving age, with no qualifications. On leaving school, he says that he was 'a bit of a drifter' for a number of years. In a time of full employment, he had a variety of jobs including being a grocery shop assistant, truck driver, van salesman, bushman, forestry worker and driving instructor. From the age of seventeen, however he began to apply each year for a job with the police or the traffic police. When he was twenty, in the mid-1960s, he was called up for compulsory military service and after a lot of soul-searching made the difficult decision to register as a conscientious objector. He identifies this as a major event in his life. Three or four years later, he was married. He sees this also as a highly significant event in his life, since it gave him a sense of stability, and family has always been important to him. When he was twenty-five, to his great joy, his application to join the traffic police was accepted and he commenced a satisfying career of twenty-two years with the Department of Transport.

Dan has not been involved in any formal education since he left school; nor has he participated in any community education; and his only involvement in voluntary organisations was as a member of the PTA at his children's school some years ago. Outside of work, his learning interests and activities have centred mainly on his home and family environment: he has always 'liked to have a project on the go'. He prefers to learn on his own or on a one-to-one basis, using books and magazines as well as relying on his brother-in-law to teach him a number of 'handyman skills' over the years.

At work, he has been involved extensively in in-service training programmes, some compulsory and others voluntary, some residential and others comprising a series of modules.

Three or four years prior to the interview, a major change took place at work with the integration of the regular police and traffic police.

At the age of forty-six I suddenly became a policeman ... It was a tremendous culture shock ... I wouldn't have believed there was such a difference between the two cultures.

There were inevitably tensions as both police and traffic officers had to accommodate themselves to the changes, and there were of course considerable pressures to learn. 'Then of course I had my breakdown and was off work for three and a half months ... I had a lot of counselling'. This led Dan into doing a lot of reading and listening:

I started to have a different outlook on life; I'm less judgmental than I used to be ... I'm a lot more tolerant of different opinions, views and persuasions ... and more committed to having normal relationships with people. Because of the nature of my job, I used to have to face continual confrontation ... Now I want a more normal existence ... with minimal confrontation, so that the things I do now are aimed towards a peaceful coexistence.

Mary is a woman in her mid-40s who was born in the early 1950s. She had been adopted and brought up by a couple, who were both 'elderly' and who lived in Christchurch. She herself has continued to live in Christchurch all her life. Mary's mother, as far as she can recall, always worked at home and never had a paid job outside the home. She was however interested in knitting and various crafts. Her father was a labourer and handyman with no permanent occupation. Both parents left school as soon as they could and neither had any educational qualifications. Neither laid any claims to 'school-wise' knowledge; neither felt that schooling had any significance either for themselves or for their children; and neither appears to have seen themselves as having any role in encouraging or discouraging their children in their schooling and education.

Mary identifies herself as working class and says that her family never knew any 'educated people'. Mary attended seven different primary schools and spent two and a half years in secondary school before leaving in the fifth form without any qualifications, when she was offered a job at the local dairy. Her experience of school was not a negative one. Indeed, she felt that school was the centre of her young life; the only negative feature being that she felt there was no one to turn to for help when she got out of depth with some of the work.

Mary has had a number of jobs, in retailing, catering (at one time she had her own successful

catering business which she really enjoyed), bus-driving, hospital work, etc., generally staying in one job for about seven years. After this time she feels that she has learned all she can, and moves on. In all her jobs, it is the newness of the work that has attracted her, and she feels that she has put a lot of her own effort into learning to do the job well. She is proud at the high level of competence she has achieved in these jobs. However, she has never sought promotion or further training.

Mary married at a young age and had the first of her two children at age 18. She has always enjoyed home and family and sees a lot of her children, who have both left home; and she is also enjoying her three grandchildren. She and her husband have recently bought an old 'character home' and are busy renovating it. This requires a good deal of learning, mainly done by reading and trial-and-error, since they have never done anything like it before.

She does not belong to any clubs, groups or organisations. Nor has she undertaken much organised education and training. She did enjoy the challenge of studying and sitting the examinations as well as the practical tests required to obtain a bus driver's licence a few years ago, as she enjoyed the responsibility associated with the job of bus-driving. On the other hand, she did not enjoy the sewing class that she had recently joined and soon withdrew from it, feeling that there were too many people in the class, several of whom were 'pushy'. In addition, she felt that she had been overlooked by the tutor. In any case, she says that her preference is for doing things on her own as she likes the feeling of achievement by using her own initiative. Despite the fact that her participation as an adult in formal and non formal education has been minimal, she does see herself as an active learner. She feels that she is learning all the time, but that it is learning activated by her and not by anyone else. She feels no need or pressure or desire to undertake any organised education or training in the future. She is content, and yet ironically she realises that lack of schooling and qualifications have probably affected her life opportunities.

Sarah, a woman in her late-30s, was born in Australia in the late-1950s. However, she has lived in New Zealand since the early 1970s and she identifies herself as a New Zealander. She has a 22 year-old daughter and a 14 year-old son, and was recently married for the third time. Her father was a policeman; her mother a 'housewife'. Neither of her parents had any formal educational qualifications. She feels that they did not support her in her endeavours as a child: she remembers being laughed at for her paintings and being told that she was cheeky when she asked questions. She feels that this had an adverse impact on her self-confidence. They neither encouraged nor discouraged her with her schooling. Sarah did not like school: she found it 'a pretty daunting thing'; and when she was fourteen, after completing only one year of high school, she ran away from home and school and went to Sydney.

Without any qualifications or experience, Sarah found a job as a shop assistant for a couple of years before having her first baby and moving to New Zealand with her first husband. She spent the next eleven years at home as a mother before eventually going back into the paid workforce as a waitress and then as a cleaner. Sarah's current paid work consists of both domestic and hotel cleaning but she sees her main occupation as 'supervising' her family and their various activities. Sarah's long-term goal or dream is to be her own boss. As a keen gardener she would eventually like to design a garden that would 'be around for a hundred years' and which would be part of her own country guest house. Sarah enjoys reading, watching and scoring at cricket, and she also enjoys trying out different handcrafts.

Sarah sees herself as a person who is very open to new ideas and to change. However she also sees herself as a diffident learner who nevertheless does persist with her projects and is generally successful in the end: 'I've just sat for about three years and wanted to learn to do this [needlepoint] and I've finally done it'. Although Sarah is not currently involved in any organised education, she has in the past participated in community education programmes relating to pregnancy and parenting. On one occasion, she also enrolled in a class to learn tapestry. However, she did not enjoy the experience. The teacher seemed incompetent - 'he showed me the wrong way to do things' - and she felt uncomfortable in the formally structured class. She left the class and eventually spotted a little old lady at the community centre who was doing some tapestry work and who was very happy to help her as a friend. She learned all she needed to from her.

Sarah's family and school experiences led her to leave school early with no qualifications and no expectation or desire to continue her education, and she still has no wish to return to formal study. However, she does not rule out the possibility of doing some further community education courses if they are likely to help her to achieve her dream. Thus she does think that at some stage in the future she might do 'a small business course kind of thing, and self defence too if I'm going to run my own business'.

Leah is a woman in her late-20s who was born in Christchurch in the late-1960s. She is married and at the time of the interview, she had a two-year-old son and was expecting another baby in four months. She lives with her husband, who is a factory supervisor, in a small house, which they are renovating to accommodate their second child. On five days a week she cares for her sister's child, and her days are taken up with housework, childcare and the demands of her parents and siblings.

Her mother was a machinist and her father a waterside worker. Both left school at fifteen, the

minimum school-leaving age, with no qualifications. Leah feels that she was a quiet child who lacked confidence and didn't have many close friends. Neither of her parents played much part in Leah's schooling; nor did they encourage her to do anything special when she was a child. They were quite strict and did not allow her to go out very often. Leah enjoyed primary school but in standard 4 recalls being called a dunce and never wanted to do maths again, although she feels that she is 'quite good with numbers and figures and things'. Her first year at secondary school was quite good, but it was 'downhill from then on'. In the fifth form, she did quite well during the year but felt the pressures of exams, failed to get her School Certificate, and left school with no qualifications and a strong sense of failure and incompetence as a learner.

On leaving school, she wanted to do something with animals, or alternatively a hairdressing apprenticeship. However there were no jobs available and the apprenticeship was too expensive. At that time, she went with her parents to live for a couple of years in Australia. Her mother wanted her to do nursing. She started part-time work experience as a nurse aide. She was happy with the work and felt that she was good at it, but felt that it was not rewarding - 'it was just a job'. On her return to Christchurch, she applied to do an enrolled nursing course but did not have the qualifications and did not have the confidence to sit any more exams. She went into full-time nurse aide work and took courses in First Aid, CPR, sewing and defensive driving, but shift-work made it difficult to complete some of these courses.

When she was in her early 20s she met her husband, who plays in a band, and for a while, she experienced some of the social life that she had missed as a youngster. However, she never developed much self-confidence or sense of direction, and marriage and the birth of her first child made it difficult to sustain the social life.

She very much enjoys having her own home and looking after her child and wants to be more than just a mother to her children. She wants them to feel free when they are older to 'sit round and talk and be friends' - something she never felt able to do when she was a youngster. However, she feels she lacks a sense of purpose and direction in her life and finds it difficult to get herself motivated and confident enough to do some of the things, such as participating in craft groups and doing yoga, that she sees some of her friends doing.

Discussion

This study strongly supports Rockhill's view(1982) that people's patterns of learning and education can only be understood in the context of their life-worlds. It is a distortion of reality to see participation as a dichotomous event, and it is even more of a distortion to equate non-

participation with non-learning.

Of the seven interviewees it seems that only Joan, a retired nurse in her late-60s and a learning-oriented person from her early years, would unambiguously have been classified by all survey researchers as an 'educational participant'. She had been involved throughout her life in a very wide range of formal and community education. Somewhat more ambiguously, Dan, aged 50, who in the course of his career as a traffic officer and then as a policeman, has participated in a wide range of training programmes, might also have been counted as a 'participant' in some studies. Even more ambiguously Sarah, in her late-30s, despite her very limited involvement in formal education and training might also have been counted as a 'participant' on the grounds of her past participation in several community education programmes.

The other four interviewees, however, would probably have been classified as 'non-participants' and possibly as 'non-learners' in most survey research studies. This notion is manifestly false in the case of two of the interviewees. Mary has been a very active learner and takes considerable pride in the high levels of competence she has achieved in her various jobs over the years. Shirley also has been a very active learner especially in developing a high level of expertise in doll restoration. In the case of Leah, the youngest of the interviewees, her self-deprecating responses and her low level of self-confidence almost certainly mask the amount of recent learning she has done in developing and reflecting on the skills, sensitivities and knowledge required by a competent mother, child-carer and home-maker. Finally, in Alfred's case, although his lack of reading and writing skills and his early acceptance that he was a 'slow learner' have undoubtedly limited his participation and learning and reinforced his dependence on his wife in a wide range of areas of life, he nevertheless sees himself as constantly learning new things and retains a wide range of interests. In addition, it is difficult to believe that he could have run his own car-wrecking business for twenty years without developing a wide range of essential learning strategies.

If one accepts, then, that people's patterns of learning and education can only be understood within the contexts of their life-worlds, it becomes important to examine the forces, including those of class, gender and race, that shape those life-worlds. A large number of studies, including those by Bowles and Gintis (1976) in North America, Bourdieu (1977)) in France, and Lauder, Hughes & Taberner (1985) and Hughes & Lauder (1991) in Aotearoa New Zealand, have documented some of the ways in which schooling and formal education in general reflects, reproduces and legitimates the structural inequalities and power relations associated with class, gender and race under conditions of late capitalism. As was noted earlier, formal education in general and credentialism in particular plays a significant role in

enabling the middle class to construct and maintain itself (Parkin, 1979). Moreover, reviews of the literature by Rubenson (1989), Courtney (1992) and Tobias (1996) suggest that much education undertaken during adulthood plays a not too dissimilar role to that of schooling in reproducing and legitimating structural inequalities. It is therefore immensely important to understand the ways in which these forces shape people's lives.

The views and perspectives on formal education of each of the interviewees as adults were powerfully affected by their experiences of schooling as working class kids. In some ways, these experiences and perspectives were similar. In other ways, they were each very different. The most striking similarity was that as children all had experienced a sense of social distance or separation between home and school. To a greater or lesser extent, they had all experienced a divided and fragmented world that became ever more divided and fragmented as they moved up the school hierarchy from primary to secondary school. Since none of the interviewees' parents had much in the way of schoolwise knowledge, none of the interviewees felt that they had received much active support with their schooling from their parents. With one possible exception, their parents had not expected or encourage them to continue their schooling or formal education or to look for middle class jobs. The findings of this study lend support to those of Hughes and Lauder (1991: 8-9) which suggest that individuals usually make decisions or engage in a kind of non decision-making with respect to education according to the collective wisdom of the group or class to which they belong.

In addition to identifying some of the ways in which the forces associated with class, gender and race shape the lives of working class women and men, it is also important to identify the ways in which different women and men from working class backgrounds seek to take control of their own lives and shape their own destinies in the light of these forces. To do this it is necessary to grasp the contradictions that exist in all our lives. The ways in which each of the interviewees responded to the realities of their fragmented and divided worlds differed widely, and these differences may be accounted for at least in part by other aspects of their lives at home and school.

Leah, the youngest of the interviewees, recalls a somewhat lonely childhood. She had few close friends, and in a tight-knit family, she feels that her parents offered her little encouragement. Leah wishes she had been able to sit around with her parents 'and talk and be friends': instead, she encountered a highly disciplined life with limited personal freedom. Leah enjoyed her primary schooling and her first year at secondary school, but claims that it was 'downhill from then on'. Although her parents had limited schoolwise knowledge themselves, they, and in particular her mother, saw its usefulness. Of all the interviewees, Leah was the only one to experience parental pressure to continue her schooling and to get a

school certificate. Her mother wanted Leah to become a nurse, and Leah did not resist this pressure. She completed her fifth-form year, and although she did quite well during her final year at school, she feels that she collapsed under pressure and hence failed the examinations. In attempting to conform with her mother's and the school's expectations of her, she appears to have buckled under the pressures. She left school with a strong sense of failure and incompetence and no sense of direction in her life. Leah's experiences as an adult since leaving school reflect the tensions arising out of her contradictory situation. Although her experiences of schooling had taught her to want a different kind of life than that of her mother, she remained largely confined within a working class world that was in many respects not too dissimilar to that of her mother. She has found enjoyment and a sense of competence in her nurse aid work and in her role as mother and caregiver and continues to educate herself, but still lacks confidence and feels a deep sense of ambivalence about pursuing wider learning interests.

Sarah's recollections of her childhood experiences at home and school are largely negative. Her parents, like Leah's, placed a high value on discipline and obedience, and Sarah found this restrictive. Nor did her parents encourage or support her in pursuing her interests. Sarah's creative attempts were laughed at and she was seen as 'cheeky' when she questioned things. Unlike Leah, however, Sarah never enjoyed school: she found it 'a daunting thing'. And at the age of 14, she took the profound step of individual resistance against the regimes she was caught in by running away from home and school. Since running away from home and school, Sarah has taken control of her life in ways which suggest a remarkable sense of independence and personal strength. As an adult she has never sought or seen the need for schoolwise knowledge or certification; she has in any case been too busy surviving, earning a living, parenting, 'supervising her family', and pursuing a wide range of interests of her own. Her negative experiences of schooling have not prevented her from participating in community education programmes when she has seen these as relevant to her concerns or from undertaking her own self-directed learning projects. At the same time, the avenues through which she has sought to take control of her life have been shaped by gender and class. Her roles in her family and the jobs she has done are those commonly done, and expected to be done, by working class women; and although she dreams of being her own boss, survival is still a preoccupation

By way of contrast, Mary's experiences of home life and schooling appear to have been positive ones. Her parents were older than those of her friends. However, this does not seem to have affected her, and her mother encouraged her to learn to knit and to try her hand at a number of crafts. What may have affected her academically is the fact that she, like many other working class children, was required to change schools a total of seven times during her

primary school years, as her father moved around in search of work. Despite these constant moves Mary enjoyed school - it was the centre of her young life - and she only left school when she was offered a job and was thus able to earn her own money, a very important reason for leaving in a family in which the income of the only breadwinner was uncertain. Mary identifies herself very clearly as working class. Her family never knew any 'educated people'. Of all the interviewees, Mary is the one who most clearly identifies the difference between 'schoolwise intelligence' and 'real intelligence' (Luttrell, 1989) as well as being aware of the class basis of these two forms of intelligence. She appears to value her working class background and is proud of the practical skills she has developed to do a number of jobs at a high level of competence. As an adult, she has never aspired to obtain schoolwise knowledge or middle class jobs. These she sees as part of a different and not particularly attractive world. And yet, she is aware of the ironies, since she recognises that her opportunities in life might have been greater had she abandoned her working class background and obtained further schooling and qualifications.

Dan's parents appear to have attempted to provide him with a positive home environment. His father, who 'was old enough to be his grandfather', provided him with a 'strong role model', and his mother, an extrovert who was musical and loved entertaining, taught him to play the guitar and drew him and his siblings into her world of family entertainment. In addition, his early schooling was a positive experience and his early school reports suggest that he did well, despite having to shift schools frequently. However, Dan was sexually abused as a child and this more than anything else is likely to have affected many aspects of his childhood and adult life. This non-class-related episode is likely to have contributed to his loss of interest in and early departure from school, his drifting as a young adult, and his social awkwardness. Despite this, his marriage and his work in the traffic department appear to have given him satisfaction and stability until the major restructuring a few years ago that precipitated his breakdown. He, like Mary, takes pride in the wide range of training he has undertaken and the high level of competence he has achieved at work. Also, like Mary, he has never aspired to obtain schoolwise knowledge or to move out of his working class background. His breakdown and subsequent counselling have, however, promoted a new reflectiveness and a greater commitment to seeking 'normal relationships with people' and to work towards peaceful coexistence. Self-education, including reading and listening, rather than school-based education, which, as Luttrell (1989 p. 37) points out, is the traditional working class way of achieving 'real intelligence', seems to be the form of education that Dan has chosen for his later adult years.

Alfred's parents, like Dan's, appear to have attempted to provide him with a positive home environment. Unlike Dan's, however, Alfred's parents were faced with constant financial

insecurity, as his father moved around in search of gardening jobs and his mother combined the job of home-maker for six children with that of a machinist. Little time and energy was available for the children who were largely left to themselves. Nevertheless, Alfred carries many positive memories of his early home life. By way of contrast, schooling was a negative experience. Like Mary and Dan, he shifted schools several times, but unlike them, Alfred never settled down. At school, he learned that he was a 'slow learner'; he learned to believe that he couldn't learn to read. By the time that he left school at the age of twelve he had been powerfully socialised to accept those personal limitations that schooling had objectified and legitimated, and hence to accept his lot in life as 'objectively' determined. For Alfred then it had been determined that schoolwise knowledge was not accessible to him; and his class position could therefore be accounted for on these grounds. Alfred was to find his satisfactions in adult life within his marriage and family and in a number of working class jobs. However Alfred, with the help of his wife, has during his adult years demonstrated that he is able to learn and acquire a high level of specialised knowledge in those areas that interest him.

Shirley's experience of home life as a child appears to have been a mixed one. Her father drank heavily and she was 'mostly afraid of him'. In addition, the family struggled financially to make ends meet. With two siblings who were very much older than her, she spent a good deal of time on her own. On the other hand, her mother was also at home much of the time and she encouraged her and taught Shirley to sew and make things and to manage on a limited budget. Shirley's experience of school was not a positive one. Schoolwise knowledge was seen by Shirley, and probably by her mother, as largely irrelevant, and so she left school as soon as she could 'to get on with my life and do it my way'. On leaving school, she went into a number of working class jobs before her first marriage. She identifies her main occupation since then as that of a homemaker and caregiver to her husband and four sons. However, especially since her early 40s she has pursued her own interests, especially in doll restoration, with considerable energy, and has developed a very high level of expertise in this field. In this as in other fields she is entirely self-taught, preferring to learn and experiment on her own, using books and friends to help her when necessary. Her whole life has been lived within a working class milieu: it has been shaped by the trials and joys that characterise that milieu. She would not want to change that. She is proud of her achievements and of the high level of competence she has achieved in her own fields of interest. She has never sought or seen the need for schoolwise knowledge or certification, and although she would not claim 'real intelligence' for herself, she would undoubtedly recognise it in others of her peers who had achieved a similar level of competence in their areas of interest.

Joan's experiences of home life and schooling, like those of Mary, appear to have been

positive ones. Her parents provided a supportive and stable environment in a small town, spoilt only by the real financial struggles that the family experienced in the depression of the 1930s. Unlike Mary, however, all her schooling took place at one local school and she appears to have enjoyed her schooling. Although most of her friends went on to secondary school, Joan, like her brothers and sister before her, left school at the end of Standard 6 to work in a working class job at the local woollen mill. Also, unlike Mary, Joan did not identify her background very clearly as working class. Although Joan valued common sense knowledge, from an early age she also deeply valued and sought after schoolwise knowledge. So much so in fact that she, unlike all the other interviewees, seems to have felt disadvantaged throughout her life by her lack of secondary schooling. The drive to compensate for this contributed in part to her feeling that she wanted education in everything that she did. Perhaps because of her small town context and because of her interests in reading and other forms of learning, in her post-school years she was successful in creating social network that included 'educated people' who were able to assist her to pursue her own self-education.

Historically, gaining entry to such occupations as nursing and primary school teaching has provided one pathway through the class barriers for some working class women in Aotearoa New Zealand. It may be argued that success in both predominantly female service occupations has drawn on both common sense and schoolwise knowledge and hence has served to diminish the barriers for talented working class women who sought social mobility. Nursing provided the pathway for the unquestionably talented Joan. As an adult, she was able to develop networks that included key people who supported her in achieving her ambitions.

Conclusion

This chapter presents some findings and reflections arising out of an ongoing study which looks at the experiences and perspectives on learning and education of people from working class backgrounds who left school at or before the minimum school-leaving age. The study strongly supports the view that people's patterns of learning and education can only be understood in the context of their life-worlds. It is a distortion of reality to see participation as a dichotomous event, and it is even more of a distortion to equate non-participation with non-learning.

The chapter sheds light on some of the realities of working class life and on some ways in which experiences of class and gender affect the learning and educational patterns of working class women and men. It also identifies some ways in which the views and perspectives on learning and education of adults from working class backgrounds are affected by their experiences of schooling. In some respects, the experiences and perspectives of all or most

people from working class backgrounds may be similar. Thus for example as children all those interviewed had experienced a sense of social distance, dislocation or separation between home and school.

In addition to identifying ways in which experiences of class and gender may shape the lives of working class women and men, the chapter also identifies some ways in which different women and men from working class backgrounds seek to take control of their own lives and shape their own destinies. In many respects, the experiences and perspectives on learning and education of different people from working class backgrounds are very different. Thus for example the study reports that some experience and perceive formal, credentialed education, and 'schoolwise knowledge' as irrelevant to their interests, while actively pursuing their own learning and educational projects, while others lay claim to the benefits of all forms of learning and education and pursue both formal and nonformal education at every opportunity. On the basis of these findings, three tentative conclusions may be drawn. In the first place, there is a danger that the demands of formal and credentialed education will increasingly penetrate and colonise the lives of those who at best perceive it as irrelevant and at worst see it as an instrument for the destruction of their class interests. Lifelong learning, coupled with credentials, may indeed become a guarantee of permanent inadequacy for an increasing number of people.

Secondly, on the one hand, we should resist those policies and practices which pressure people to continue their formal studies or which make people feel guilty or inadequate if they have not done this or that course or qualified for this or that certificate. On the other hand, we should do all we can to ensure that opportunities remain truly open and accessible to all who wish to continue their formal education. For some people from working class backgrounds, it is crucial that the doors to formal credentialed education be kept open throughout the adult years. These are the people who are likely to benefit most from adult entry programmes, from policies that seek to recognise prior learning, and increased opportunities for open learning.

Thirdly, since formal credentialed education may continue to be seen as irrelevant or oppressive by many people from working class backgrounds, nonformal and informal credential-free adult education should continue to be supported and developed as a significant component of any education system in the future. Such programmes should seek to provide resources and support for those who are unlikely ever to make demands on the formal system, but who may be, or may become, active independent learners.

Section 3

Curriculum Issues

This is the largest and most diverse section of the book. It consists of six chapters which discuss a wide range of ‘curriculum issues’. Notions of ‘curriculum’ and ‘curriculum theory’ are highly problematical ones within the context of lifelong learning and adult education discourses. Indeed, they are often considered irrelevant and/or inappropriate in a field which defies the limits of institutionalisation. In 1983 Colin Griffin pointed out that in everyday usage ‘curriculum’ has come to denote ‘... a course of study pursued in an educational institution such as a school’ (1983 p. 11). As a consequence some have argued that the concept of curriculum is too formalised to be of use to the fields of lifelong learning and adult education, characterised as they are by flexibility, informality and non-hierarchical forms of learning. In the light of this, some would argue that the notion of ‘curriculum’ is not only unnecessary and inappropriate but also downright dangerous in the context of discussions of lifelong learning and adult education, since the concept may be used to govern or direct those sectors of the educational system which are and should remain ungovernable.

Colin Griffin, however, argues that the everyday notion of ‘curriculum’ is inadequate, and that a commitment to curriculum analysis is essential to the construction of an adequate theory of adult education. He suggests that most existing theory in the field of lifelong learning and adult education is somewhat limited and superficial since it is based on an inadequate theory of curriculum. Most curriculum theory in lifelong learning and adult education, he goes on to argue, is based on key notions of need, access and provision, whereas ‘curriculum theory’ in relation to schooling has moved on to examine critically assumptions about knowledge, culture and power which underpin different understandings of curriculum (1983: 38). Moreover, Geoffrey Squires undertakes an analysis of the ‘curriculum beyond school’ (Squires, 1993) in an attempt to demonstrate the breadth of the field of adult learning and education. Despite its ambiguities (see for example Whitty & Young, 1976), the notion of the ‘hidden curriculum’ reinforces a theoretical perspective which rejects those understandings of curriculum which see it as being limited to a formalised body of knowledge or to a course of study planned and directed by an external authority or by an institution or teacher.

For the purposes of this book, the notion of curriculum is defined in the broad sense advocated by Squires: it is an inclusive notion referring to a wide range of learning opportunities, facilities and resources. It also refers to the ways in which these are framed, organised and classified by a wide range of individuals, organisations, groups, communities and institutions to achieve a variety of ends. It is thus a fluid, open-ended and inclusive concept. However,

curriculum is not without structure; it is not lacking organisation. At one level, this organisation - this structure - has been shaped by the relations of class, gender and race as well as by other social, cultural, economic and political forces. At another level, it has also been shaped by women and men working individually and collectively - in groups, in social movements and in organisations - to achieve their own goals and purposes. Curriculum has thus historically constituted a constantly changing terrain of struggle, as changes have taken place in the forms of learning which have received legitimisation and recognition.

As has been noted earlier, the field of lifelong learning and adult education has a rich and diverse history, and those of us working in the field are privileged to be able to draw on a range of traditions. The first chapter identifies some of these traditions, and looks at programme trends and patterns - the curriculum - in one city in Aotearoa/New Zealand in the 1980s and 1990s in the light of changes in state policy and the impact of neoliberal agendas. The chapter concludes by reviewing key policy initiatives and posing questions concerning possibilities for the future. The second chapter, chapter 7, looks at changes during the same period in one curriculum area, viz education programmes for active citizenship, defined as those programmes focused explicitly on raising public awareness and/or promoting action on issues of policy. Both of these chapters draw substantially on a data-base developed for a large-scale research project looking at the curriculum of lifelong learning and adult education in Christchurch over a thirteen-year period from 1983 to 1995.

The third chapter, chapter 8, looks at the impact of neoliberal state policies on the programmes of one voluntary organisation, the Canterbury WEA. It also draws on the above-mentioned data-base as well as on other data obtained from organisational files at the WEA. It tells something of the story of the remarkable way in which one small voluntary organisation battled with some success to maintain a commitment to programmes for active citizenship in the face of financial cutbacks and in the midst of an unfriendly political environment. The fourth chapter, chapter 9, looks at the impact of neoliberalism on the introduction of the New Zealand Qualifications Framework; the fifth chapter, chapter 10, traces the history of the development of educational policies and programmes over the past twenty years; and the sixth, chapter 10, looks at lifelong learning and adult education and the universities in New Zealand.

Chapter 6

The curriculum of lifelong learning and adult education in Christchurch in the 1980s and 1990s and the impact of neoliberalism

Introduction and background

As has been noted earlier, the field of lifelong learning and adult education has a rich and diverse history, and those of us working in the field are privileged to be able to draw on a range of traditions. This chapter identifies some of these traditions, and looks at programme trends and patterns in one city in Aotearoa/New Zealand in the 1980s and 1990s in the light of changes in state policy and the impact of neoliberal agendas. The chapter examines whether we are losing touch with some of these traditions as a consequence of increasing globalisation. In particular it examines whether democratic traditions are being lost as corporations and governments seek to reduce the scope of adult learning programmes and as those of us working in the field find ourselves either actively seek or are driven to conform with neo-liberal policies that rest on ideologies of instrumental rationalism and abstract individualism. The chapter concludes by reviewing key policy initiatives and posing questions concerning possibilities for the future.

This chapter opens with a brief discussion of the diverse traditions and purposes of lifelong learning and adult education. In the light of the variety of purposes and traditions, it explores some of the ways in which the advancement of neo-liberal political agendas re-shaped the purposes and priorities of adult education at a time of major change in one city in Aotearoa/New Zealand. Through an examination of programme trends in Christchurch over a fifteen-year period, it also explores some of the ways in which democratic liberal and progressive traditions of lifelong learning and adult education have been affected by these changes.

This chapter and the next one draw on data which form part of a larger project the aim of which is to throw light on the changing face of post-compulsory education and training in Aotearoa/New Zealand over a thirteen-year period from 1983 to 1995. This chapter, then, outlines the methodology adopted for the study. It then goes on to analyse the data to identify trends and patterns as well as locating these trends and patterns in a wider context of policy changes.

As we have noted earlier, the 1980s and early 1990s in Aotearoa/New Zealand were years of economic, social and political upheaval characterised by low levels of capital accumulation and high levels of unemployment and underemployment. They were years when the welfare state along with many democratic institutions and practices were under attack from the forces

of multinational capital (See for example Dale & Robertson, 1997; Snook, 1997). A previous publication (Tobias & Henderson, 1996) has identified some key trends and patterns in the provision of adult education programmes for active citizenship in one New Zealand city between 1983 and 1991. This chapter and the next one build on these findings drawing on a larger data base over a more extensive period.

The nature and impact of policy changes instituted by successive governments under the influence of neoliberal ideologies have been widely documented (See for example Dalziel & Lattimore, 1996; Jackson & Jordan, 2000; Kelsey, 1993, 1995; M. Law, 1993; M. G. Law, 1997; Olssen & Matthews, 1997; Rosenberg, 1993; Stalker, 1996; Tobias, 1990a). Overall, these policies were designed among other things to expose New Zealand institutions, both private and public, more fully to the forces of global capitalism. With increasing privatisation of state services, they also constituted a direct attack on the welfare state.

Traditions and purposes in adult education

The field of lifelong learning and adult education has a rich and diverse history (See for example, J. Dakin, 1996; Foley & Morris, 1995; Tobias, 1996) and those of us working in the field are located within diverse discourses and draw on a wide range of moral, political and intellectual traditions (Elias & Merriam, 1995; Lawson, 1982; Ruddock, 1981; Tobias, 2000b; M. Welton, 1997). Conservative and neoconservative discourses have shaped those forms of education, which have sought to preserve traditional social, political and economic structures and hierarchies and have played a key role in cultural reproduction. This they have done by combining processes of assimilation and exclusion and by preserving hierarchical and exclusive forms of education (Eliot, 1948).

Liberal, pragmatic and progressive education discourses and traditions, on the other hand, have shaped many important forms of adult education through much of this century. These traditions of adult education, at times linked closely with movements of economic, cultural, social and political reform, have sought to extend democracy and to challenge the conservative hegemony. In addition, these traditions have offered a challenge or critique (albeit oft-times muted and ambivalent) of neo-liberal economic doctrines, economic rationalism and other forms of technicism and managerialism (See for example M. Collins, 1991). At the same time, in keeping with their reformist tendencies, they have at times served to legitimate elitist and individualistic tendencies inherent in the various forms of imperialism and patriarchy, which have characterized the growth of global capitalism over the past hundred years. In addition, they have lent support to the assimilation of women and men from working class backgrounds, ethnic minorities and indigenous peoples within mainstream cultural, economic and political

institutions.

By way of contrast, radical traditions of lifelong learning and adult education have been located within a wide range of struggles to challenge and overthrow dominant cultural, economic and political institutions (Allman, 1999; Allman & Wallis, 1990; Crowther, Martin, & Shaw, 1999; Foley, 1999; Freire, 1972, 1973, 1985; M. Horton & Freire, 1990; Johnson, 1988; P. Mayo, 1999; Newman, 1994; Thompson, 1980; Walker, 1990; Westwood & Thomas, 1991; Youngman, 1986, 2000). They have been influenced by a number of radical theories including socialism and feminism, as well as by the struggles and experiences of women and men from working class backgrounds, ethnic minorities and indigenous peoples. Educators working within these traditions have rejected the possibility of achieving educational neutrality, and instead have sought commitment through praxis. They have attempted to remain grounded in the everyday lives of people, whilst simultaneously seeking to move beyond these everyday experiences in order to identify public issues to provide a focus for political struggle.

In view of this diversity of traditions and experiences, it is not surprising to note that at various times and places lifelong learning and adult education programmes have contributed in a variety of ways to a number of very different social, economic, political and cultural agendas and struggles. Thus, for example, within democratic liberal and progressive traditions in recent centuries, they have contributed to the following:

- the preservation and enhancement of cultural traditions;
- the promotion of critical awareness, sensitivity and appreciation of cultural, scientific, and artistic traditions, and the dissemination of information, insights and understandings of these traditions;
- the promotion and facilitation of creativity and of imaginative endeavours;
- the promotion of functional, cultural and critical literacies;
- the promotion, preservation and strengthening of traditions of democracy and active citizenship;
- the production of social capital and the promotion of civil society;
- the promotion of cultural, educational, economic and political mobilisation of marginalised, exploited or oppressed groups and communities;
- the promotion and support of community development;
- the provision of support and assistance to adults, who for whatever reasons, were 'cooled out' of formal education when they were young, to enable them to achieve their educational, cultural, occupational and social goals;
- the promotion and facilitation of lifelong learning; the promotion of economic development and the maintenance and upgrading of knowledge and skills required in the labour market; and

- the promotion of organisational effectiveness by providing management, employees' and workers' education, training and development programmes.

On the other hand, it is important to avoid the trap of utopianism: for this reason we should note that under capitalism no institution or organisation can remain free of the influences that arise out of the demands of the political economy and its contradictions (Foley, 1994; C. A. Torres, 1990; Youngman, 2000). Lifelong learning and adult education, in so far as it takes organisational and institutional form, is no exception. Thus, over the past century, it may be argued that lifelong learning and adult education programmes have also contributed in various ways to the following:

- advances in the technical means of production and control necessary to the process of capitalist accumulation, and the dissemination of the technical and managerial skills and knowledge required to achieve these purposes;
- the construction and reconstruction of the social relations of capitalist production, including the maintenance and preservation of the middle class as a class, for example through the expansion of credentialism;
- the maintenance of hegemonic relations necessary to the advance of capitalism in successive epochs;
- the production and reproduction of cultural and ideological forms and traditions necessary to capitalist accumulation, including the preservations of ideologies of individualism, economic rationalism and those associated with the alleged 'equal playing field' and 'free market' underpinning neo-liberal economic policies; and
- last, but by no means least, the legitimisation of the structures and policies required for the development and advance of capitalism,

In the light of this variety of purposes, and taking into account the social, economic and political forces which affect the ways in which these purposes are played out, this chapter explores some of the ways in which the advancement of neoliberal political agendas (Kelsey, 1995) re-shaped the purposes and priorities of lifelong learning and adult education at a time of major change in one city in Aotearoa/New Zealand. In particular, through an examination of programme trends over a fifteen-year period, it explores some of the ways in which democratic liberal and progressive traditions of lifelong learning and adult education have been affected by these changes.

This is almost certainly the first study of its kind undertaken anywhere in the world. It was initially inspired by the work of Graham Mee & Harold Wiltshire in the UK (Mee & Wiltshire, 1978) and Jim Dakin here in New Zealand (J. C. Dakin, 1980). However, it is very much broader in its scope than either of these works. Whereas Mee and Wiltshire looked at

publicly funded 'non-vocational' adult education and Dakin looked at schools-based community education, this study embraces all kinds of lifelong learning and education for adults that could be identified. Moreover, whereas Mee & Wiltshire and Dakin examined relevant curricula in a single year, this study covers a thirteen-year period. All the other studies that I have been able to identify are either of the 'snap-shot' variety, which present a picture of adult education provision in a community at a single point in time, or they are focused exclusively on one sector or institutional form e.g. schools, tertiary institutions, or selected voluntary organisations. In addition, none of the community-wide studies that I have been able to identify are grounded in critical policy analysis in the way in which this study is.

This chapter and the next draw on data which form part of a larger project the aim of which is to throw light on the changing face of post-compulsory education and training in Aotearoa/New Zealand over a thirteen-year period from 1983 to 1995. The project is intended to provide answers to the following kinds of questions:

- In what ways, if at all, has the provision of educational programmes for adults changed over the period?
- Is there evidence of increasing or decreasing instrumentalism and/or commercialisation of educational programmes during the period?
- Was there a growth or reduction in the number of leisure-oriented programmes or in vocationally-oriented programmes? Or was there an increase or reduction in the use of educational programmes to solve or mitigate social and economic problems?
- Was there evidence of either decimation or a resurgence of movement-based education? What forms of interaction between movement-based education and more traditional forms of adult and tertiary education have emerged?
- In what ways have the various voluntary organisations, agencies and institutions responded to changes in the labour market and in particular to increased unemployment and underemployment?
- Was there an increase in credentialism? And what impact if any did the establishment of the New Zealand Qualifications Authority have on the field?
- What have been the effects of the disestablishment of the Vocational Training Council and its Industrial Training Boards and their replacement by Skill New Zealand and the Industry Training Organisations?
- In what ways have the contributions of universities, polytechnics, colleges of education, schools, voluntary organisations and private providers to the field of adult education changed over the period?
- What were the forces underlying these changes? And more specifically to what extent were the changes driven by the forces of economic rationalism and by neo-liberal ideologies?

Methodology

In order to answer these and other questions, a data-base consisting of all forms of tertiary and adult education and training programmes offered to the people of Christchurch every alternate year from 1983 to 1995 was developed. Thus, our data cover the following seven years: 1983, 1985, 1987, 1989, 1991, 1993 and 1995. Christchurch is a town with a population of 350,000. It is located on the East coast of the South Island, and is the largest city in the South Island and the third largest in New Zealand. It is a city with a strong educational tradition with two universities located in its vicinity, one polytechnic and one public College of Education together with several private tertiary providers and secondary schools.

The information for the database was obtained from three main sources. In the first place, a systematic search was undertaken of each page of every issue of *The [Christchurch] Press*, the only morning daily newspaper serving Christchurch, over a 15-week period during January/February, May/June, and August/September in each of the years covered by the research. The aim of the search was to identify every educational programme or activity advertised or referred to in any way in the news, feature, or advertisement columns. The weeks covered by this search were chosen after a preliminary investigation had shown that the bulk of programmes offered each year were advertised during these dates. They included the periods before the start of each term as well as the dates of publication of the education or continuing education supplements published by *The Press*.

In addition to this, the systematic search of every page of *The Press* was extended to cover the remaining months of each year with the more limited but nevertheless considerable objective of identifying every educational programme for active citizenship intended for the general public. 'Educational programmes for active citizenship' were defined as programmes or activities intended to inform people about or respond to, protest against, critique, challenge, promote, discuss, debate or advocate any issues or concerns of public policy. The programmes identified addressed issues and/or policies in the following areas: gender issues; bicultural issues; issues of racism; peace issues; environmental/ecological issues; economic issues; trade union & industrial relations issues; issues of employment & unemployment; job training issues; health issues; educational policy issues; local, regional & national issues; issues concerning children & young people and their families; issues concerning social policies and social services; issues concerning the media; international affairs; issues of politics; general issues; issues concerning disabilities; and animal rights issues. They included courses, classes, workshops, seminars, hui, conferences, discussion groups, talks, lectures, symposia and forums, public meetings, demonstrations, marches and other organised efforts to address

issues or to raise public awareness of specific issues. The decision to extend the coverage in this way was made once it had been determined that although the vast majority of programmes were identified in the 15 week period each year, notices and reports on educational programmes for active citizenship were inevitably scattered throughout the year.

The second source of data was the Canterbury Public Library situated in Christchurch. From the early 1980s, this library maintained a Directory of Continuing Education (DICE), which provided the public with a source of information on programmes offered in all parts of the city. A wide range of educational institutions, voluntary organisations and community groups were invited to send information about their programmes to the library. These included the University of Canterbury, Christchurch Polytechnic Institute of Technology, all the schools in the city which offer programmes, the WEA, community centres, recreation centres and sports stadiums, the Family Planning Association, Marriage Guidance Council, Parents' Centre, and many other specialised agencies and centres providing programmes for the public.

The third sources of data were the agencies and organisations themselves. Firstly, we obtained sets of brochures and prospectuses from as many organisations and groups as possible for the period 1983 to 1995. Secondly, we consulted organisational files and records to check on our data and to obtain further information on enrolments and programme cancellations to add to the database. Thirdly, selected agency heads, programme planners and key organisational members have been interviewed to obtain additional information and to find out what they identified as the factors affecting changes in their programmes.

Finally, in addition to building up the above-mentioned database, we have been engaged in an ongoing study of policy changes at the national level. This involves consulting a wide range of official and unofficial documents and reports and newspaper clippings, as well as conducting interviews with policy-makers and drawing on secondary source material.

The programmes identified included year-long as well as short courses and classes, both full-time and part-time. They included workshops, seminars, hui, conferences, study-tours, discussion, study & support groups, talks, lectures & symposia, forums, public meetings, demonstrations, protest marches and other organised efforts to address issues or raise public awareness of specific issues. Some of the programmes were open to anyone interested while others were restricted to specific occupational or interest groups. They included formal certificate, diploma and degree courses as well as a very large number of credit-free nonformal and community education programmes. Each programme was allocated its own record in a Filemaker Pro computer file. This file was then linked with another one in which the name of every organisation identified in the search, together with a designated abbreviation, was

entered. Each programme was then coded on the basis of some twenty categories using a separate field for each category.

These categories were the following: the date of the programme; the subject or programme area; the type of organisation; the source/s of funding of the programme; the fees charged (if any); the number of participants; the format of the programme or the predominant methods used; the length of the programme; the regional location of the programme; the intended participants; whether or not the programme was credentialed; the orientation of the programme to capitalism whether or not the programme addressed any issues of public policy, i.e. whether they could be described as educational programmes for active citizenship; and the kinds of issues (if any) which were addressed or dealt with in the programmes. To all this was added the name or title of the programme, and notes on any additional information that might be relevant to our purposes.

As indicated above each programme was classified into at least one programme or subject area. This classification was based on our understandings of the main purpose/s or intention/s of the organisers offering the programme. It was recognised that organisations may offer programmes with multiple purposes: hence, provision was made for the multiple coding of programmes where this was considered appropriate. The programme or subject areas were decided upon only after an extensive literature review as well as a period of experimentation with our data to determine the most useful framework for our purposes. Once this had been decided upon, the researchers experienced little difficulty in coding programmes, and only minor changes were made to meet the requirements of changing circumstances. Coding reliability was maintained by extensive ongoing consultation between researchers on any items that gave rise to any doubt as well as by sample cross-checks.

The following are the principle programme or subject areas used in this study:

- Job-related education and training, including trades-related, technical and professional programmes, programmes dealing with administration and management, secretarial, sales, teacher education, farming, and all employment and pre-employment programmes;
- Adult Basic Education, including programmes intended to develop skills and competencies (other than job-skills) necessary for everyday living e.g. basic driving, basic budgeting & 'life skills, as well as general education at a secondary level or at a level which prepares people for tertiary study e.g. literacy, numeracy, ESOL, study skills, School Certificate, 6th Form and 7th Form subjects;
- General Adult Education, including programmes in the humanities e.g. literature, languages, history, arts, music, the physical and natural sciences and the social

sciences, degree studies (other than professional and technical);

- Hobbies and recreations, including all 'non-vocational' arts, crafts, games- and sports-oriented programmes e.g. dance, creative writing, drama, music-making, collecting, genealogy, pottery, scuba diving, travel and mountain-bush programmes;
- Home and family life, including house maintenance, cooking, gardening, parenting, child care, looking after elderly parents and personal relationship roles within the family e.g. partner, parent and child;
- Personal development, including health and physical fitness, sexuality, relationships (other than those between parent and child and in the family), assertiveness, coping with stress, time management, anger management, planning for retirement, effective speaking, etc;
- Civic, political and community programmes, including all programmes dealing with social and political issues, current affairs, civil defence, community development, working with groups, training for voluntary work, first aid, etc;
- Religious and spiritual programmes; and
- Finance and investment programmes.

In addition each agency, organisation or institution which offered a programme was classified on the basis of a framework developed to suit our purposes following an extensive literature review, into one of the following categories:

- Public or state organisations with education or training as its primary function e.g. schools, polytechnic, college of education, university, wananga;
- Public or state organisations with education or training as its secondary or subordinate function e.g. government department or ministry, local authority;
- Capitalist organisations, businesses or (for-profit) enterprises with education or training as a primary function e.g. commercial college, private training enterprise;
- Capitalist organisations, businesses or (for-profit) enterprises with education or training as a secondary or subordinate function e.g. manufacturer offering pre-employment courses, retailer or finance house offering seminars as part of product promotion, training offered as part of labour recruitment;
- Voluntary (non-profit) organisations, trusts or incorporated societies with education or training as a primary function e.g. WEA, Project Waitangi, Adult Reading & Learning Association (Adult Literacy Organisation), Te Ataarangi, some trusts set up to run pre-employment courses, and Community Centres;
- Voluntary (non-profit) organisations, trusts or incorporated societies with education or training as a secondary or subordinate function e.g. Citizens Advice Bureaux, Plains FM, THAW, Federated Farmers; and
- Private individuals.

For the purpose of the analyses contained in this book, I have drawn only on the data on Christchurch-based programmes, which were intended to draw most of their participants from greater Christchurch. Excluded are distance learning programmes, national conferences, and programmes offered by organisations and institutions from outside the region which were advertised in Christchurch.

Despite the extensive search and the breadth of scope of definitions used, a number of important limitations remain. We have relied heavily on printed sources. This inevitably means that we have not been able to identify all informal and nonformal programmes. Moreover, since our data have been drawn largely from the public arena, it should be noted that we have not been able to identify in-house and other programmes which have not featured in the public domain. In spite of these limitations, it would seem that our data do provide a reasonably comprehensive picture of what may be called the public curriculum of adult education in Christchurch.

The findings on patterns and trends are reported in this chapter in two separate sections. The first section draws on the full data-base for Christchurch as described above. It consists of data on a total of 28,374 programmes. The data presented in Figures 5.1 & 5.2 below are therefore comprehensive. They cover all kinds of programmes, formal and nonformal, short and long, full-time and part-time, organised in Christchurch in every field of activity in the relevant years. In addition to courses and classes, they include workshops, seminars, conferences, talks, lectures, symposia, public meetings and demonstrations.

The second section draws on a somewhat smaller data-base of 21,430 records consisting only of courses and classes. These were defined as educational programmes comprising sequential sessions planned and directed by one or more teachers or tutors and generally requiring enrolment of some kind by the participants. The data presented in Figures 5.3 to 5.6 below are drawn from this somewhat smaller data-base. Included are all courses and classes, formal and nonformal, short and long, full-time and part-time, organised in Christchurch in every field of activity in the relevant years. Excluded are workshops, seminars, conferences, talks, lectures, symposia, public meetings, demonstration, and all the other short programmes, as well as study and support groups.

Changes in the curriculum of adult education, 1983-95

Overall trends and patterns

The first and possibly most striking finding relates to the diversity and richness of the

‘curriculum’ of lifelong learning and adult education in Christchurch.

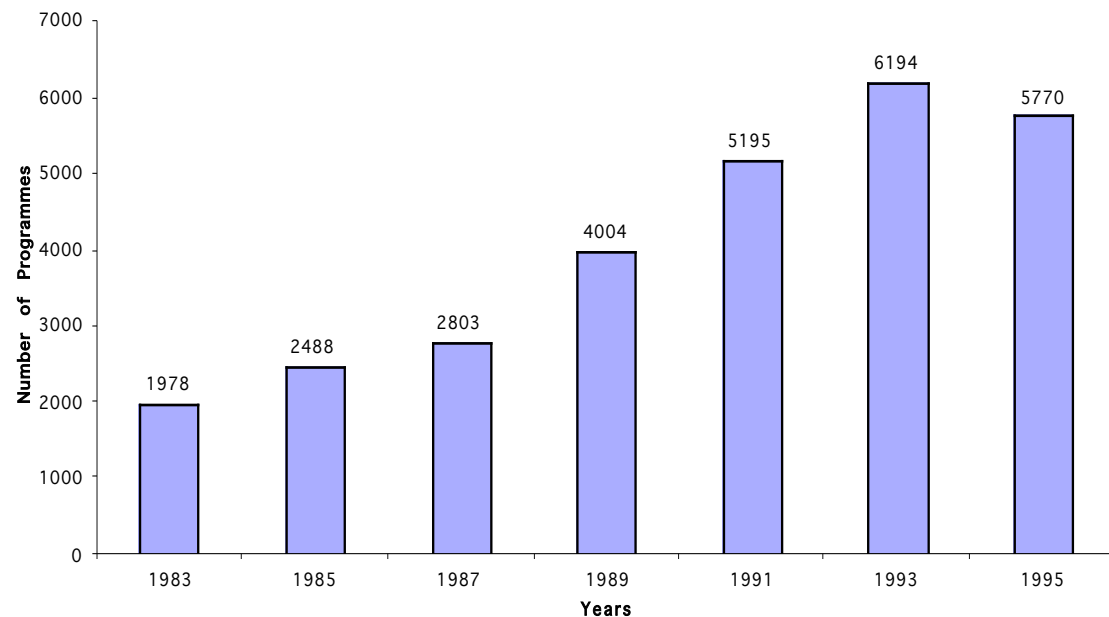
The following gives a flavour of the very wide range of programmes offered: Accounting; aesthetics; agriculture; animal husbandry, animals & pets; Antiques; archaeology; architecture, interior design & decoration; astrology; astronomy; aviation and flying; bee-keeping; boat building; bookbinding; boomerangs; business studies and management; carving; ceramics & pottery; circus skills; civil defence & emergencies; commercial cleaning; commerce; communication; community development & community studies; computers, computing and information technology; construction; consumer issues; cosmetics and skin care; counselling; cooking and the culinary arts; basketry, cane work and kete; candle work; carving and sculpture; embroidery and crochet work; drawing; fabric art; floral work; glass work; graphics; knitting; lacework; leather work; macramé; metal work; painting; paper craft; porcelain work; sculpture and stone work; sewing and needlework; spinning and weaving; woodwork; printing and etching; fine arts and folk arts; creative living; the classics; dance ballet and movement; drama, theatre and film; driving; development studies; ecology; economics; education; electronics, electricity & radios; engineering; English; fabrics, clothes, clothing & textiles; family planning; fishing; forestry and timber products; solar power; fund-raising; furniture; gambling; gardening and landscape design; genealogy; geography; geology; hairdressing; health issues; history; homemaking; horticulture, plants and gardens; human relations and interpersonal skills; journalism; linguistics; languages and cultures; law and legal issues; leadership; librarianship; life history; literacy and adult basic education; literature and books; local government; Maori; marketing, promotion and publicity; mathematics and statistics; mass media; metals and metal work; modelling; music and music-making; nature and natural and physical sciences; nursing; parenting; personal development; philosophy; photography; physical education, fitness, sports & outdoor pursuits; printing and publishing; prisons; public speaking & debating; race relations; real estate; religious studies, religion & spirituality; safety; sales; sedentary games; secretarial & clerical work, typing and word-processing; security; social and recreational activities; social sciences, politics, current affairs and foreign affairs; storekeeping & warehousing; tourism and travel; trade certificates; trade unions and industrial relations; international trade; victim support; weather forecasting; wine and viticulture; and writing.

It may be argued that the diversity of the curriculum reflects in general the rich diversity of human interests and particularly the cultural and economic resources and social capital (Baron, Field, & Schuller, 2000; Robinson, 1997; Schuller & Field, 1998) available in Christchurch in the 1980s and 1990s. Whether the curriculum was more or less diverse than in other cities at this and at other times is, however, a matter of speculation. In the light of the findings of this study however it does seem likely that differences would be found if further

comparative research were to be undertaken.

A second finding relates to the substantial growth in the overall number of programmes over the period. Figure 5.1 documents this growth. It shows the number of programmes offered in

Figure 5.1
Number of educational programmes for adults of all kinds organised every second year in Christchurch, 1983-1995



Christchurch every second year over the period from 1983 to 1995. Despite the slight fall-off in 1995, the overall growth was substantial, with almost three times more programmes being offered in 1995 than in 1983.

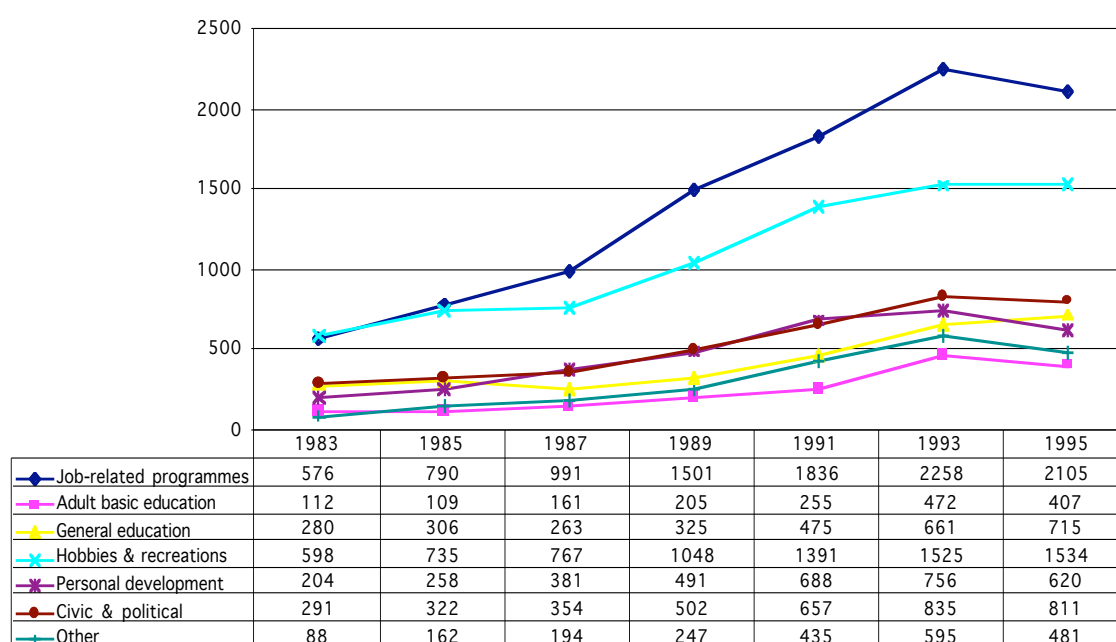
This growth is remarkable; and the data could be used to paint a glowing picture of growth in learning opportunities together with a rapid shift to a learning society. However, a more critical view suggests that we need to know more about the nature of the growth, before we can begin to draw such conclusions. This is especially important when it is recognised, as pointed out above, that this growth took place at the very time that neoliberal policies were being implemented, first by a Labour Government and then by a National Government, and when there was a growing gap between rich and poor globally (Maddison, 1995; Seabrook, 2000, Feb 17-23) as well as locally (Statistics New Zealand, 1999; United Nations Development Programme (UNDP), 2001 p 19).

How then do we explain the phenomenon? What was the nature of the growth? Is there evidence that the provision of adult education was becoming increasingly dominated by economic rationalism or the new vocationalism (See for example Cohen, 1984)? Was it being

seen as providing solutions to problems of unemployment? Which kinds of programmes grew? And which fell away? Was there a growth or falling away in job-related programmes? Or in general education programmes or adult basic education programmes? Or in personal development, or family-oriented, or recreational programmes? Or in programmes intended to promote active citizenship? Was there a shift in the balance of these programme areas within the overall ‘curriculum’ of adult education? Or was there a growth or falling away in the contribution of programmes from the public or private sector or from the voluntary organisations of civil society? And how can we explain the changes?

Let us look first at the overall changes that have taken place in the various programme areas over the years. Figure 5.2 summarises trends in the provision of all kinds of programmes over the period from 1983-1995.

Figure 5.2
Trends in the organisation of education programme in various programme areas, 1983-1995



The first, and perhaps most striking, feature of the ‘curriculum’ as reflected in this graph is the similarity of the pattern of change across all fields of adult education. In each of the fields, there was an overall pattern of growth. However, the rate of growth varied somewhat between each of the programme areas. Programmes focusing on finance and investment (not identified as a separate category in the graph) grew fastest. They rose from a total of only 9 in 1983 to reach a peak of 81 programmes in 1993 before falling back to 65 in 1995 - an average growth rate of 52% per annum. However, the number of these programmes remained relatively small. The next largest increase was in the number of home and family life programmes, which grew

from 62 in 1983 to 426 in 1993 before falling back to 352 in 1995. This represented an average annual increase of 39% per annum over the entire period. Programmes addressing religious and spiritual topics (also not identified as a separate category in the graph) grew from 17 in 1983 to 88 in 1993 before falling back to 64 in 1995 - an average growth rate of 23% per annum.

Job-related programmes, which grew from 576 in 1983 to 2258 in 1993 and then 2105 in 1995, and adult basic education programmes (including literacy and numeracy), which grew from 112 in 1983 to 472 in 1993 and 407 in 1995, each increased by 22% per annum. Programmes addressing personal development topics, which increased from 204 in 1983 to 756 in 1993 and then 620 in 1995, grew by 17% per annum. Those focusing on civic, political and community topics, which increased from 291 in 1983 to 835 in 1993 and then 811 in 1995, grew by 15%. Finally general education programmes, which increased from 280 in 1983 to 661 in 1993 and then 715 in 1995, and hobby and recreational programmes, which increased from 598 in 1983 to 1525 in 1993 and then 1534 in 1995, each grew at the rate of 13% per annum.

A second striking feature of the 'curriculum' as reflected in the graph is the continuing predominance of job-related programmes as well as programmes related to hobbies and recreational activities throughout the period. In 1983, the 576 job-related programmes comprised 29.1% of all programmes organised in Christchurch. In the light of the high rates of unemployment in the late-1980s and early 1990s and the widely held perception promoted by neo-liberal ideologues that much of this unemployment derived from low skill levels, it is not surprising that many also believed that unemployment could be solved at least in part by providing education and training for the labour market. Hence, by 1995 the number of job-related programmes had increased to 2105, comprising 36.5% of all Christchurch programmes.

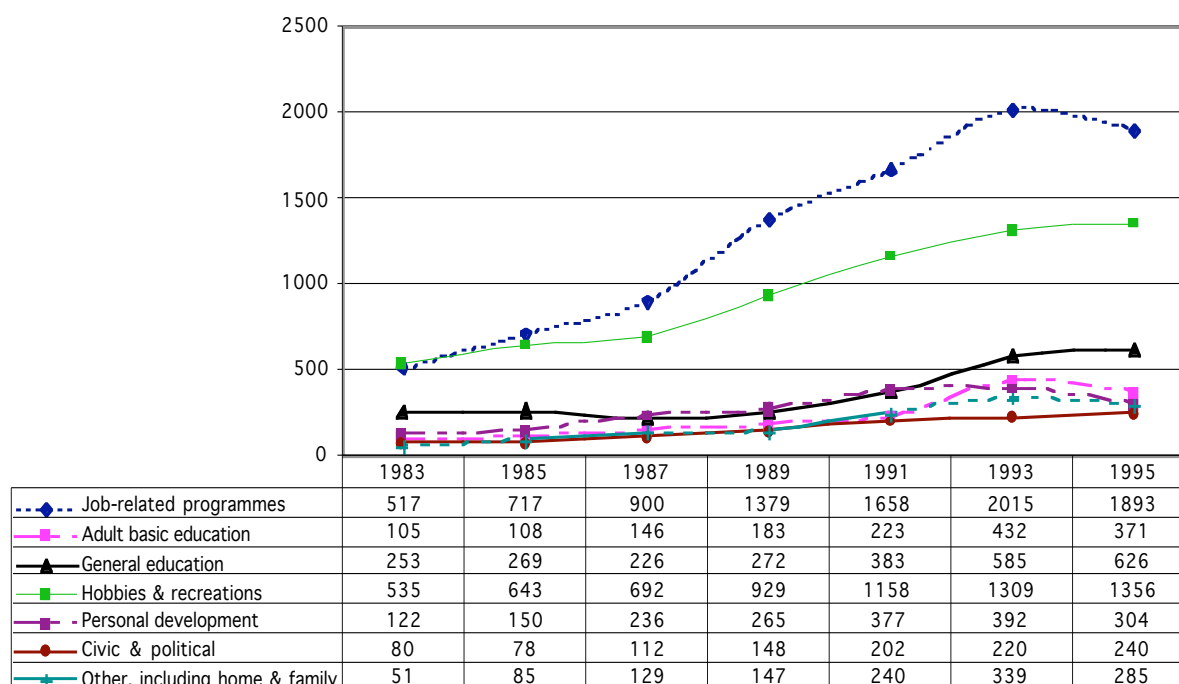
What is perhaps more surprising is the continuing predominance of hobby- and recreation-related programmes. In 1983, the 598 programmes in the field of crafts, hobbies & recreations comprised 30.2% of all programmes. By 1995, this had increased to 1534, and although this constituted a somewhat reduced proportion, viz. 26.6%, of all Christchurch programmes, they nevertheless continued to occupy a pre-eminent place in the total curriculum. No other programme area was anywhere near as large. The next largest programme area was that devoted to civic, political and community topics. This comprised 14.7% of all programmes in 1983 and 14.1% in 1995.

Trends and patterns in the provision of courses and classes

As indicated above, the data presented in Figures 5.1 & 5.2 are comprehensive. They cover all kinds of programmes organised in Christchurch in every field of activity in the relevant years. Thus, in addition to courses and classes, they include workshops, seminars, conferences, talks, lectures, symposia, public meetings, demonstrations, etc.

In order to investigate whether the patterns of change would be similar if a more limited and somewhat more traditional definition of education were to be used, we undertook a further analysis of a section of the data. Figure 5.3 summarises the findings of this further analysis. It presents data on the patterns of change in the provision of courses and classes only. Excluded

Figure 5.3
Trends in the provision of classes & courses only i.e. excluding other forms of programmes, 1983-1995



are all the other shorter programmes as well as study and support groups.

Clearly, the pattern of change in the number of courses and classes offered each year (as shown in Figure 5.3) is very similar to that for all programmes (as shown in Figure 5.2). Once again, some variations are apparent in the patterns of growth between programme areas. Courses and classes on home and family life topics grew fastest from 39 in 1983 to 240 in 1995 at an average annual growth rate of 43%, and those on finance and investment topics (not identified as a separate category in the graph) grew the least at an annual rate of 8%. Only 6 and 12 such courses were held in 1983 and 1995 respectively. Courses on religious and spiritual topics (also not identified as a separate category in the graph) grew from 6 to 33 over

the period at an average growth rate of 38% per annum.

These were followed by job-related courses, which grew from 517 in 1983 to 1893 in 1995, at an average annual rate of 22%; and adult basic education courses, which grew from 105 in 1983 to 371 in 1995, at an average rate of 21% per annum. Courses addressing civic, political and community topics grew from 80 in 1983 to 240 in 1995, at a rate of 17% per annum and those on hobby and recreational topics grew from 535 in 1983 to 1356 by 1995 at a rate of 13% per annum. Finally, general education courses, which increased from 253 courses in 1983 to 626 in 1995, and personal development courses, each grew at the rate of 12% per annum.

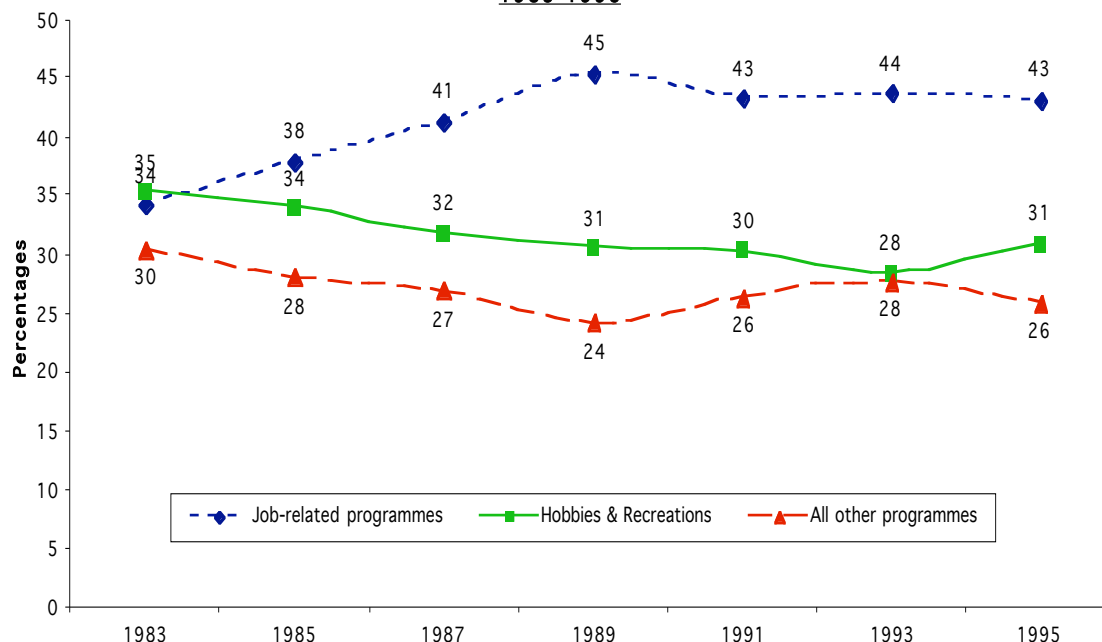
We have now looked in some detail at the shape of the curriculum and patterns of growth both in the number of all kinds of programmes and in the provision of courses and classes over the period from 1983 to 1995. In order to present a fuller picture of overall trends, however, it will also be useful to examine the relative contributions of different programme areas to the pattern of provision. In addition, we will analyse the contributions of various kinds of organisations to the field, before turning finally to present a picture of trends in the provision of active citizenship classes and courses (Tobias, 2000a).

Firstly, then, to examine the contributions of different programme areas to the overall picture, the distribution of courses and classes between different programme areas as shown in Figure 5.3 and 5.4, was somewhat similar to that of all programmes as shown in Figure 5.2 in the previous section. Figure 5.4 enables us to compare the proportion of job-related, hobby and recreation-related, and other types of courses over the period. The data presented point to the following. The growing pre-eminence of job-related courses is shown clearly. The proportion of job-related courses rose from 34% of all courses in 1983 to 45% in 1989 and then levelled off at 43% in 1991 and 1995.

Courses in the hobby and recreation-related programme area also occupied a pre-eminent position in the curriculum. In 1983, this constituted the largest programme area; in 1995, it constituted the second largest. At the same time the proportionate contribution of hobby and recreation-related

courses fell steadily from 35% of all courses in 1983 to 31% in 1989, to 28% in 1993, before rising again to 31% in 1995. As far as all other courses and classes are concerned, they comprised 30% of the total in 1983 and fell away to 24% in 1989 before levelling off at 26% in 1991 and 1995. In spite of the overall increase in number of courses in most programme areas, it is clear that the proportion of job-related courses grew at a significantly higher rate than in any other programme area. On the other hand, hobby and recreational courses

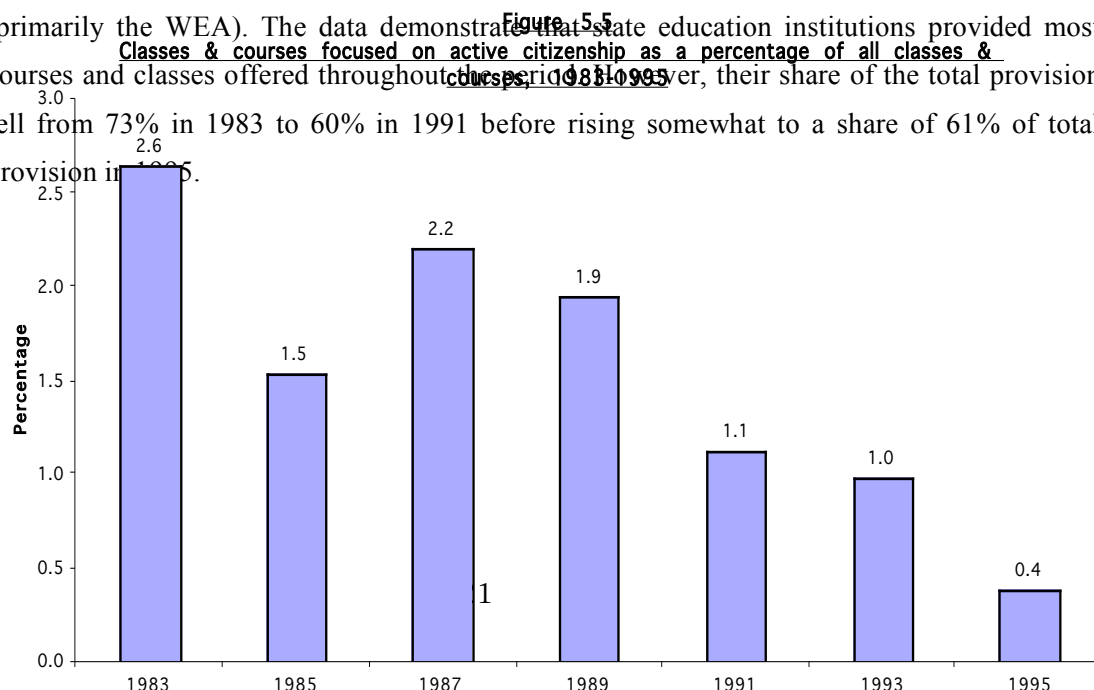
Figure 5.4
Proportions of job-related, hobby-related and other classes and courses, 1983-1995



remained a significant component of the entire curriculum, and the third largest programme area was constituted by general adult education courses, which comprised 17% of all courses in 1983 and 14.3% of all courses in 1995.

Secondly, as we move to Figure 5.5, it should be noted that the overall number of active citizenship classes and courses (i.e. those courses explicitly designed to analyse, critique or challenge public policies or issues) fell away significantly over the period from 40 in 1983 to 17 in 1995. Figure 5 presents a picture of the falling off in these classes and courses as a percentage of all classes.

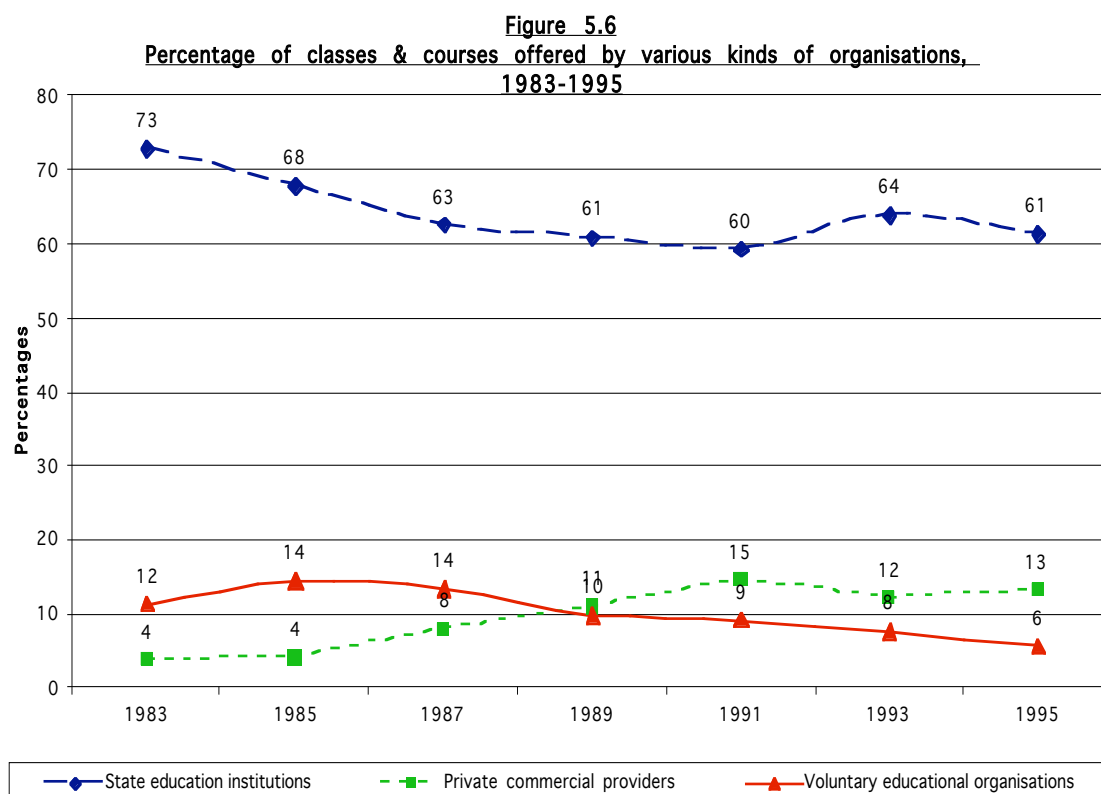
Finally, Figure 5.6 enables us to compare the relative contributions of public or state education institutions (the universities, the polytechnic, the college of education and the secondary schools), private commercial education establishments, and voluntary education organisations (primarily the WEA). The data demonstrate that state education institutions provided most courses and classes offered throughout the period 1983-1995, but their share of the total provision fell from 73% in 1983 to 60% in 1991 before rising somewhat to a share of 61% of total provision in 1995.



There was also a significant falling away in the proportion of courses offered by voluntary organisations. In 1983, 12% of the total class provision was contributed by voluntary organisations. This contribution rose to 14% in 1985. From that year however it fell steadily to 6% of total provision in 1995. By way of contrast, in 1983 the proportion of all courses and classes offered by private commercial providers was very small. It stood at 4% of total provision. From 1985, the proportion of these classes grew rapidly to reach 15% in 1991. Thereafter it fell somewhat until in 1995 private commercial providers contributed 13% of the total provision of classes and courses.

Policy changes

On the basis of the data presented above the following general observations may be made. The period from 1983 to 1995 was characterised by considerable overall growth in lifelong learning and adult education provision in Christchurch, with about a three-fold increase in the number of programmes. The most significant increases took place in job-related programmes,



with nearly four times more programmes in 1995 than in 1983. In addition, job-related programmes came to occupy an increasingly dominant position in the curriculum of adult education, with 43% of total course provision in 1995 as compared with 34% in 1983. In spite of this, courses in other areas also saw substantial increases. Thus, for example about two and

a half times more hobby-related classes were offered in 1995 than in 1983. Nevertheless, even with these increases, hobby-related classes as well as other classes came to occupy a somewhat less prominent position than vocational classes within the total adult education curriculum. Moreover, the number and proportion of adult education classes for active citizenship fell away significantly over the period. Finally, although state education institutions taken together continued to provide the largest share of classes and courses throughout the period, their share of total course provision fell from 73% in 1983 to 61% in 1995. The proportion of their contribution as well as that of voluntary educational organisations, which fell from 12% to 6% of the total curriculum, was affected by the steady increase in the proportion of courses offered by the emergent private commercial providers.

These changes can be attributed to a number of policy developments in the late-1980s and early-1990s. In 1986, the labour government adopted two initiatives. Firstly, in June it launched Access, a major new employment-related education and training programme. This constituted a key response to high unemployment. It involved a significant shift of resources from job-creation to training, a decision to 'target' state funds to provide education and training assistance to unemployed people, and particularly to unemployed people drawn from 'disadvantaged' groups, equal recognition of private and state training providers in the competition for state funding, and a decentralisation of decision-making to newly established Regional Employment and Access Councils. The establishment of Access led to a growth of job-related courses and, to a somewhat lesser extent, to adult basic education courses for unemployed people; it also provided the foundation for increasing privatisation of many of these courses.

Secondly in December 1986 the department of education announced the amendment of regulations governing schools-based community education to allow for the devolution to schools of decision-making on schools-based community education programmes, subject only to guidelines provided by the department (later the ministry) requiring schools to consult with local communities and to allocate some resources to 'disadvantaged groups'. This important step, which received very little attention from the media and from educationalists in general, had a significant effect on lifelong learning and adult education. Not the least important of these effects was the doubling of hobby-related classes between 1987 and 1993 as well as increases in classes in other areas. As a consequence of the 1986 amendment, for the first time in their history, schools in general were largely free to make their own decisions on which programmes should receive priority as well as on questions of format and length of programmes. This process was taken even further through the Education Act of 1989, which provided for major changes in the administration of schools, with each school being chartered to the newly created Ministry of Education. The benefits of greater school autonomy, which

may give, rise to new programme possibilities need to be set in the context of the wider financial pressures on schools and the consequent increasing pressures on community education coordinators to generate new revenues for the school.

As was discussed in an earlier chapter, the Education Act of 1989, which focused on the school sector, was followed in 1990 by an Education Amendment Act, which brought about a major re-structuring of post-compulsory education and in particular tertiary education. This Act provided inter alia for: the establishment of a common system of management and administration of all tertiary institutions on the basis of charters; the use of a common Equivalent Full Time Student (EFTS)-based formula for the allocation of state funding; institutions to seek actively for alternative sources of funds to supplement their state subsidies; the establishment of the Education & Training Support Agency (ETSA) to administer Access and industry-related programmes; and the establishment of the NZ Qualifications Authority (NZQA) with wide powers to develop a new qualifications framework. The Act thus provided for a very much greater degree of autonomy from state control for polytechnics and colleges of education, while also signalling a possible increase in state control of universities. The Act also provided for tertiary institutions to engage in new forms of entrepreneurialism. This Act was passed by the Labour Government in June 1990.

In November of that same year, a National Government was elected to office on the promise of a 'decent society', and on a tide of voter disenchantment with a Labour Government, which had all but destroyed the welfare state compromise. In December 1990, however, one of the first initiatives of the new government was to produce an 'Economic and Social Statement', which announced massive cuts in welfare benefits and housing assistance. This was followed in 1991 with a whole series of measures designed to cut back radically on the provisions of the welfare state.

In July 1991 the National government announced its new education policies as part of its first budget and within the context of a very strong commitment by government to neo-liberal ideology along with a view which suggested that New Zealand's economic ills derived from past protectionist policies and limitations and skill deficits in the labour market. Policies thus included a wide range of measures. The standard tuition fee for tertiary studies was to be abolished and instead individual tertiary institutions were to be required to set their own fees. 'Study Right', a mechanism which enabled the state to fund different categories of tertiary students at different rates and to reduce progressively the level of funding of older students, was to be established. Cuts were announced in student allowances to bring them into line with the unemployment benefit, and the iniquitous student loan scheme was introduced. A capital charge on the assets of tertiary institutions was proposed, and cuts were announced in the

funding of NZQA, the Career Development and Transition Education Service, ETSA, and a wide range of community groups. It was announced that all state funding of the WEA would be withdrawn.

The introduction of a new 'Industry Skills Training Strategy' was announced in 1991 and the new measures were set in place in June 1992 in terms of the Industry Training Act. This included the progressive replacement of Access by TOP – a more highly targeted and restricted Training Opportunity Programme. It also included the establishment of a Youth Traineeship Scheme, and the consolidation of other funds for training, apprenticeships, etc. to be available on a contestable basis to new Industry Training Organisations (ITOs). These ITOs, funded partly by government and partly by industry, were recognised by ETSA and replaced the previous tripartite Industry Training Boards. The ITOs were to operate their own training programmes leading to competency-based qualifications approved by NZQA, and, in line with neoliberal thinking, it was envisaged that the role of the state would be a limited and diminishing one with employees and employers taking an increasing measure of financial responsibility for the training.

In 1991, the NZQA adopted its new qualifications framework. This was designed to provide for the development of a flexible, modularised competency-based system of education and training, in which it would be possible for individuals' previously attained competencies to be recognised and in which all education and training would lead to nationally recognised qualifications. In February 1993, the first units of the new qualifications framework were launched. In the meantime, in 1992, the government passed the Union Representatives Education Leave Act Repeal Act. This Act provided for the withdrawal of the right of union representatives to paid educational leave, as well as for the disestablishment of TUEA. It was enacted to conform with neoliberal orthodoxy, and in spite of evidence of considerable success on the part of the Trade Union Education Authority (TUEA) in providing useful education and training for working people, many of whom had had little if any positive prior experience of education,

In addition, in October 1992 the government announced new School Community Education Instructions. Although these did not result in any new state funds going into schools-based community education, they did provide for existing funds to be distributed more equitably to schools in different localities across the country. As a consequence, some schools lost access to state resources while others benefited, and overall it seems that Christchurch schools may well have lost some funding. In addition to this, these Instructions provided for further guidelines for schools and the establishment of groups to advise schools on the use of these funds, as well as requiring that at least 15% of the funds be made available to community groups. Measures such as these had been called for for a number of years. However the

positive effect of the requirement that schools provide some support for community groups was somewhat limited by the fact that many community groups and voluntary organisations were facing severe cuts in state funding from other sources at the same time.

Conclusion

The above summary of policy developments has thrown some light on key factors influencing the changes in the 'curriculum' of lifelong learning and adult education over the period which we identified and described in a previous section of this chapter. Our findings highlight some of the ways in which neo-liberalism and the policies to which it has given birth have influenced these changes. The picture presented suggests that some narrowing of the curriculum was taking place over the period, with the proportion of job-related courses rising from 34% in 1983 to 43% in 1995. The findings lend support to the view that economic rationalism and the new vocationalism were gaining strength. Moreover, as we have seen, there was an apparent fall-off in the number and proportion of education programmes for active citizenship, and this may signal a loosening of the links between adult education and a range of democratic imperatives. And the increasing privatisation, competition, fragmentation, commercialisation, commodification, entrepreneurialism and credentialism all signal a shift in the focus of lifelong learning and adult education. Increasingly, it would appear, adult education came to be viewed, not as a process to be valued in itself or for its part in promoting and supporting democratic traditions, or even for its part in developing individual skills and knowledge, or in promoting greater equality of educational access. Rather, it seems, it came to be viewed increasingly a very different way. On the one hand, it came to be seen as a consumer commodity to be bought and sold in the market place in much the same way as any other commodity within a capitalist economy. On the other hand, in the light of human capital theory (Fitzsimons, 1997; Hughes & Lauder, 1991), it came to be seen as a form of investment, which may be justified only to the extent that it provides human labour power with the skills and expertise required to generate surpluses.

It would appear that at least part of the growth of job-related and other courses between 1987 and 1995 took the form of employment-related courses for the increasing number of unemployed. There is little evidence to suggest that the establishment of Access and Top has contributed much to the solution of problems of unemployment. Despite the rhetoric, there is little evidence to support the argument that increased levels of unemployment and underemployment over the past 15 years have arisen because of a lack of skills in the labour market. On the contrary there is ample evidence to suggest that it was the neoliberal economic and monetary policies of successive governments that gave rise to high levels of unemployment and that unemployment rates are at best only closely linked with levels of

formal education or credentials. This is not of course to suggest that adult education and training programmes should not be made readily available to those people and citizens who have been marginalised or exploited by the political economy of advanced capitalism or who for one reason or another have been ‘cooled out’ of formal schooling (Clark, 1960).

At the same time as there seems to have been an increasing vocationalism of the curriculum, the period also witnessed a continuing expansion of recreational and hobby-related classes and courses, areas of traditional strength in the New Zealand system. The growth in these and other courses did not match that in the vocational area. Nevertheless, it was significant and does require explanation. This explanation may be found partly in the changes to the regulations governing school-based community education, the reforms of educational institutions, and in particular the freeing up of polytechnics. These may be seen as manifestations of progressive forces, which remained active, albeit on the back foot, within the labour government of the 1980s and among some people within the ministry of education in the early 1990s. They may also be seen to reflect in some measure the inertia within the schools-based system of community education that had been noted as far back as the 1970s. Thirdly, they may be interpreted as arising out of the increasing pressures on institutions to generate increasing proportions of their budgets from entrepreneurial course developments. Certainly, over the period there was a significant increase both in public institutions and in the private sector in the number of courses designed to generate surpluses.

Does all this imply the inevitable triumph of neo-liberalism? The evidence does not support this conclusion. On the contrary, it seems that counter-hegemonic forces of resistance have re-emerged to oppose the neo-liberal agenda. In the next two chapters, some of the evidence of the part played by educators and in particular by those working within a social movement context to maintain and strengthen democratic forms of adult education. This task requires both educational and political action, and events since the election of the Labour-led government in December 1999 suggest that at least some new frameworks and arenas have been established within which it is at least possible to engage in the process of struggle and resistance to the encroachments of corporate globalisation, and to re-embark on the long haul to democracy.

Chapter 7¹

Lifelong learning and adult education for active citizenship - institutional and community contexts

Introduction

In common with many other countries, the 1980s and early 1990s in Aotearoa/New Zealand were years of considerable upheaval. The welfare state along with many democratic institutions was under attack from the forces of multinational capital. This chapter reports some of the findings from a large-scale study investigating the impact of these changes on educational institutions' and voluntary organisations' contributions to adult and community education for active citizenship. From one perspective adult education for active citizenship was alive and well in the late-1980s and early 1990s. The period saw an increase in the number of social movements and 'non-educational' voluntary organisations and groups engaged in adult education for active citizenship. Much of this drew on progressive or radical democratic traditions. From another perspective the position of adult education for active citizenship was by no means as positive. Educational institutions varied widely in their commitment to adult education for active citizenship. Most institutions, drawing on conservative and pragmatic traditions, demonstrated little commitment, while those that were involved drew on liberal traditions. These traditions, grounded in discourses that de-politicised education, reinforced the boundaries between adult education and political action and thus served to legitimate the ideologies of the New Right.

Much of the 1980s and early 1990s in Aotearoa/New Zealand was a period of economic, social and political upheaval characterised by low levels of capital accumulation and high levels of unemployment and underemployment. It was also a period when many democratic institutions were under attack from the forces of multinational capital and the neoliberal ideologues who promoted the reorganisation of capitalism.

The nature and impact of policy changes instituted by successive governments under the influence of neo-liberal ideologies have been documented elsewhere (See for example Dalziel & Lattimore, 1996; Jackson & Jordan, 2000; Kelsey, 1993, 1995; M. Law, 1993; M. G. Law, 1997; Olssen & Matthews, 1997; Rosenberg, 1993; Stalker, 1996; Tobias, 1990a). Overall, these policies were designed among other things to expose New Zealand institutions, both private and public, more fully to the forces of multinational capitalism. With increasing privatisation of state services, they also constituted a direct attack on the welfare state. Policies

¹ This chapter is based on an article published in the *International Journal of Lifelong Education*, 19 (5) September-October 2000. I am grateful to the editor and publisher for permission to draw on this

were justified by a claim that they would result in increased market competition, and hence greater efficiency, cost-effectiveness and reductions in state expenditure and taxation. The overall effect of these policies has been to reduce significantly in real terms the incomes of beneficiaries and low-paid workers, to transfer wealth from those with the lowest to those with the highest incomes, and to increase the real gap between rich and poor. At the same time, there is little if any evidence to suggest that the policies have resulted in greater efficiencies and cost-effectiveness.

A previous publication (Tobias & Henderson, 1996) has identified some key trends and patterns in the provision of adult education programmes for active citizenship in one New Zealand city between 1983 and 1991. We demonstrated there that during this period there was a resurgence of collective self-education, generally taking place within the context of social movements and organised by a wide range of voluntary organisations and community groups independently of educational institutions.

This chapter builds on these findings. One aim is to examine in greater detail the roles that were played by educational institutions (schools, colleges, polytechnics and universities) and by voluntary adult education organisations in providing and promoting adult education for active citizenship and hence in maintaining democratic traditions. Various theories of citizenship and citizenship education are discussed and a second aim of this chapter is to identify and critique the formal and informal theories of citizenship and education for active citizenship that were reflected in programmes organised by educational institutions and voluntary adult education organisations.

Historical background

In 1984 in response to a perceived economic crisis, the newly elected labour government instituted a wide range of policies strongly influenced by neo-liberal, monetarist economists. These included the floating of the New Zealand dollar, the lifting of foreign exchange controls, the abolition of restrictions on foreign ownership of financial institutions, the progressive removal of export subsidies and import tariffs, duties and restrictions, the broadening of the tax base with the introduction of GST (initially 10% but raised in 1989 to 12.5%), the lowering of company taxes and of marginal rates of income tax paid by those on high incomes, the reduction in the scope of the provision of a number of state services and of state expenditure on the provision of these goods and services, the promotion of 'user pays' policies, and the corporatisation and later privatisation of an increasing number of assets and agencies of the state. All these measures and others were designed to expose New Zealand

article.

institutions, both private and public, more fully to the competitive forces of capitalism.

The attack on the welfare state, initiated by the labour government in the mid-1980s and somewhat stalled in the late-1980s, was pursued with renewed vigour by the national government, which came to power in November 1990. At a time of very high unemployment, benefits were slashed and the stand-down period required before one could claim an unemployment benefit was extended to six months. The trade union movement came under direct attack and in 1991 legislation was enacted that was designed to break the political, industrial and educational influence of trade unions. 'User pays' policies, and policies designed to cut back on state-provided services were prosecuted with renewed enthusiasm. Throughout the period the gap in income and wealth between rich and poor continued to grow, with increasing segmentation of the labour market as well as in the markets for goods and services.

Other changes and pressures characterised the period as well. Some of these changes were progressive. The peace movement gained some significant victories culminating in the declaration of a nuclear-free New Zealand and the signing of the Treaty of Rarotonga in August 1985 creating the South Pacific as a nuclear-free zone. In the 1980s, the women's movement achieved some successes in gaining a greater measure of recognition of the rights of women in the labour force, in politics, in education, and in the effective criminalisation of domestic violence. Homosexuality was de-criminalised in the late-1980s. Considerably more attention was given to securing greater protection for consumers.

Other changes were contradictory in their effects. Between 1975 and 1984, the previous national government had pursued a predominantly coercive strategy in order to contain the increasing pressures and resistance by Maori. In 1984, the labour government chose the path of "*passive revolution*" - a strategy described by Gramsci as the "inclusion of new social groups under the hegemony of the political order without any expansion of real political control by the mass of the population over politics" (Cited in Kelsey, Jane, 1993: 234). The Treaty of Waitangi Amendment Act was passed in 1985. This gave the Waitangi Tribunal power to investigate and make recommendations on Maori grievances going back to the signing of the treaty in 1840. This and other legislation and policies pursued by both labour and national governments over the period failed to contain Maori demands for political sovereignty, and economic and cultural self-determination. On the contrary, these measures merely served to heighten the contradictions between those elements of state policy which sought to recognise Maori claims to self-determination and those which re-asserted the necessity to retain state control, as well as those designed to dismantle the welfare state and integrate New Zealand more effectively within the political economy of world capitalism.

Theoretical background

As mentioned previously, the purpose of this chapter is to investigate the extent and nature of the contributions of educational institutions (schools, colleges, polytechnics and universities) and voluntary adult education organisations to adult education for active citizenship. Before doing so, however, we need to clarify the different constructions and meanings of active citizenship and the implications of these constructions for adult education programming.

Notions of democracy, citizenship and citizenship education are controversial (See for example Elliott, 2000; Faulks, 2000; See for example Vandenberg, 2000). Their meanings are grounded in a range of political histories, and they have been shaped by the material conditions characterising successive historical periods and by the discourses to which these have given rise. These material conditions, together with the traditions and discourses to which they have given rise have established boundaries on what counts as citizenship. They have also legitimated educational policies and practices in the various institutional and community contexts. In addition, they have given shape over the years to the many different forms and practices of democracy, lifelong learning and adult education for active citizenship. Not surprisingly, then, interpretations of these key concepts have been widely discussed from within a range of theoretical perspectives and philosophical and political traditions. These have included conservative, liberal, marxist and feminist perspectives as well as social democratic, pluralist and postmodern ones (See for example Barbalet, 1983; S. a. G. Bowles, Herbert, 1986; Martin Carnoy & Levin, 1985; Hirst, 1986; Ichilov, 1998; Mann, 1994; T. H. Marshall, 1950, 1977; Pixley, 1993; Roche, 1992; Bryan S. Turner, 1986; Bryan S. Turner & Hamilton, 1994; Vasta, 2000; Vogel & Moran, 1991).

Henry Giroux (1988 p. 5) has pointed out that:

Citizenship, like democracy itself, is part of a historical tradition that represents a terrain of struggle ... it is not a term that has any transcendental significance outside the lived experiences and social practices of individuals who make up diverse forms of public life.

These ‘lived experiences and social practices’ and the conditions in which they have been embedded have also given rise to a range of traditions and discourses of educational policy and practice. In particular they have influenced the ways in which boundaries have been established between legitimate and illegitimate educational policies and practices within the various institutional and community contexts, as well as the strength of these boundaries (See Bernstein, 1973 pp. 227-256, 1996). In addition, they have shaped in other ways the many

different forms and practices of lifelong learning and adult education for active citizenship.

Traditions of adult education for active citizenship have also varied widely (See for example Benn, 2000; Bond, 2000; Brookfield, 1987; Elliott, 2000; Foley, 1999; Giroux, 1989; Johnston, 1999; M. Mayo, 2000; Murphy, 2001; Newman, 1994, 1999; Schuller, 2001; Usher, Bryant, & Johnston, 1997). They include conservative and pragmatic traditions, within which little if any attention is given to the provision of educational programmes for active citizenship, except perhaps in relation to the preservation of traditional institutions and forms of authority. They also include liberal education traditions, which emphasise the importance of adult education for active citizenship, provided that it is limited to the promotion of 'rational' or intellectual analysis of public policy issues and institutions, and that every effort is made to ensure that the curriculum is 'balanced', or 'unbiased' or 'neutral'. In addition, there are a range of progressive and radical traditions within which organisations and institutions actively seek to develop policies and strategies of engagement in adult education for active citizenship and in particular encourage their members to engage in education and action that involves political commitment.

The aim of this chapter is to identify the contributions made by educational institutions (schools, colleges, polytechnics and universities) and voluntary adult education organisations between 1983 and 1995 in providing lifelong learning and adult education programmes for active citizenship, and to explore some of the ways in which these programmes for active citizenship reflected a range of historical traditions and discourses.

Over the past fifty years, much theorising about the nature and significance of citizenship has been strongly influenced by the work of Thomas Marshall (1950; 1977) (1950; 1977). Marshall, a British social democrat, proposed his theory of citizenship in a series of lectures in 1949 at a time when the post-World War 2 labour government in the U.K. was setting in place the framework for the welfare state there. His view is an optimistic one in that he believed that the working class through the ballot box and conventional politics had made substantial gains. He defined citizenship as:

'... a status bestowed on those who are full members of a community. All who possess the status are equal with respect to the rights and duties with which the status is endowed' (T. H. Marshall, 1977 p.93).

Central to his argument was the view that a permanent and irresolvable tension or contradiction existed between the demands of capitalism and the principles of citizenship. The development of capitalism inevitably rests on the production of class inequalities and thus generates class struggles; whereas the principles of citizenship undermine these inequalities:

the advance of citizenship thus renders class struggle superfluous. Drawing on two centuries of British history, he argued that the modern concept of citizenship consists of three elements - the civil, the political and the social - each of which emerged at a different stage in the struggle for, and attainment of, citizenship.

'Civil citizenship emerged in the 18th century. It comprised ... the rights necessary for individual freedom - liberty of the person, freedom of speech, thought and faith, the right to own property and to conclude valid contracts, and the right to justice ... Political citizenship emerged in the 19th century. It comprised ... the right to participate in the exercise of political power, as a member of a body invested with political authority or as an elector of the members of such a body ... The third stage, social citizenship, developed through the 20th century, and comprised ... the whole range (of social rights) from the right to a modicum of economic welfare and security to the right to share to the full in the social heritage and to live the life of a civilized being according to the standards prevailing in the society' (T. H. Marshall, 1950 pp. 10-11).

As one commentator has suggested, Marshall believed that:

'Through these stages the major classes of modern capitalism, bourgeoisie and proletariat, institutionalised their struggles with the ancien régime and with each other. Citizenship and capitalism were still at war, Marshall declared, but it was institutionalised, rule-governed warfare' (Mann, 1994 pp. 63-64).

Marshall's theory has been profoundly influential in the study of modern forms of citizenship. In response to a number of criticisms, Bryan Turner and other reformist writers have sought to modify and build on the theory. Thus, in 1986 Turner argued that:

'... T. H. Marshall's conception of citizenship can be elaborated and combined with Barrington Moore's (1966 and 1972) historical analysis of democracy to develop an historical and global framework for conceptualising the development of universalistic citizenship' (Bryan S. Turner, 1986 p. 64).

In addition, while acknowledging that Marshall's theory is open to criticism on the grounds that it fails to take into account the impact of struggles over gender and race in the development of different forms of citizenship, Turner argues that the theory can readily be expanded to recognise that particular forms of citizenship are a product of a wide range of specific historical circumstances and struggles. He makes a distinction between 'active' and 'passive' citizenship, and argues that where the institutions of citizenship are the outcome of a combination of class struggles, war, migration and egalitarian ideologies, citizenship is more likely to be "... real and expansive rather than formal and defensive" (Bryan S. Turner, 1986 p.

67). In addition he and Peter Hamilton argue for the:

'... reform of the Marshall legacy to take into account the fact that citizenship is not a unitary concept but reflects profound differences in the historical experiences of political participation' (Bryan S. Turner & Hamilton, 1994).

These attempts to build on and reform 'the Marshall legacy' need to be set alongside the far more fundamental critiques that have challenged some of the basic premises on which the original theory rests. These critiques have been mounted by people on the right and left of the political spectrum. On the one hand, with the large-scale reorganisation of capitalism following the crises of the 1970s and 1980s, libertarian conservatives and neo-classical liberals have mounted a sustained attack on the principles of social citizenship. These supremely individualistic theories argue that the protection of civil and political liberties and the advancement of the welfare of individuals hinges on acceptance of the predominance of market forces. Freedom from coercion is the primary form of freedom (Hayek, 1960). The state has no right to infringe upon this freedom or to impose constraints or restraints on the freedom of individuals to produce or exchange their products, goods, services, labour and ideas in the free market. Hence the pressures to reduce taxation levels, to abolish or reduce the levels of benefits provided by the state, to remove the state from the funding and provision of health, education and conservation, and instead to privatise these services, leaving their provision in the hands of individuals and corporations.

Far from seeing the development of social citizenship and the emergence of the welfare state as contributing to human emancipation, libertarian conservatives and neo-classical liberals argue that these institutions have severely constrained the progress of capitalism, enslaved human beings and distorted human growth. In this view, the rights and duties of citizenship must necessarily be reduced to those required to ensure the advance of capitalism since it is only within this system that individual freedom can be sustained. Paradoxically therefore the democratic rights and responsibilities of citizens must be severely constrained so that the alleged freedom and equality of isolated and independent individuals operating in the free market may be preserved.

On the other hand, feminists, radical democrats, socialists and progressives drawn from a wide range of social movements and philosophical and political traditions have also mounted fundamental challenges to Marshall's theory. It has been seen as a broadly functionalist theory, which viewed the forms of parliamentary, and social democracy and the institutions associated with the welfare state that emerged in the middle years of the 20th century in a positive light. It failed to recognise the gendered nature of citizenship and welfare at the time. It also failed to recognise the paternalism inherent in the Fabian tradition of social engineering

that generated dependency and the de-politicisation associated with a form of second class citizenship and that opened the way to the ideological and political onslaught by the libertarian conservatives and neoclassical liberals in the 1980s (Pateman, 1985; Pixley, 1993; Roche, 1992).

Other critiques have centred on the teleological, evolutionary and Anglocentric assumptions underlying the theory, as well as the considerable reliance placed on the centralised mechanisms and institutions of liberal democracy to balance the demands for equality arising from the struggles of the working class and from other social movements against the inevitable inequalities generated by capitalism. Thus, for example Michael Mann (Mann, 1994) suggests that, although Marshall's account of the emergence of social citizenship may be a substantially correct historical account in the case of England, this account should not be generalised. It should be understood as an account of one set of strategies that have been developed by the ruling class in one state during a particular historical period, to institutionalise and contain class conflict. In a comparative historical analysis of industrialised states, he identifies not one but five such strategies. Thus, he suggests, an authoritarian monarchist strategy that predominated in 19th century Germany, was followed by an authoritarian fascist strategy under the national socialist party in the 20th century. In the Soviet Union from the 1920s, an authoritarian socialist strategy had been pursued by a communist government, which emphasised the social rights of citizens, while providing little, if any, support for their civil and political rights. By way of contrast, he argues, in the USA a liberal strategy, which is equivocal on the social rights of citizens while emphasising their civil and political rights, has predominated. On the other hand, in Scandinavia a reformist 'corporatist', negotiated strategy has been pursued, in which the struggles over the civil and political rights of citizens have been more protracted, but where a fuller acceptance of the social rights of citizenship has been achieved.

In his analysis of citizenship, Mann is strongly influenced by Marxist traditions. Many Marxists have argued that under conditions of capitalism, the institutions of the state must be understood primarily as bourgeois institutions, which in the final instance must necessarily serve the interests of capital. In this view, the scope of democracy and citizenship within the capitalist state is necessarily and increasingly limited and constrained. This then provides a basis for arguing that under these conditions socialists and others seeking radical change should not involve themselves in bourgeois politics. There is evidence to support this interpretation. However Marx's own view on democracy and the state appears to have been much more complex and subtle (See for example Barbalet, 1983; Milliband, 1983). Moreover, in recent times many feminists, socialists and progressives, writing within a Marxist tradition, have sought to revive long-established radical and critical democratic elements within this

tradition (See S. a. G. Bowles, Herbert, 1986; Brosio, 1994). This in turn has resulted in calls for new interpretations of citizenship in which the principles of active citizenship derive from and are informed not only by the ultimate necessity and inevitability of the downfall of capitalism, but also by a recognition of the importance of challenging other forms of oppression, exploitation and exclusion, which do not necessarily derive from the capitalist system.

These calls for a new interpretation of active citizenship have gained greater urgency following the attacks on the welfare state by the new social movements since the 1970s, the revival of various forms of conservatism and neo-classical liberalism contained in the ideological onslaughts of the New Right, and following the collapse of authoritarian socialist regimes in the Soviet Union and Eastern Europe. Over the past two decades, the politics of citizenship has moved back onto centre stage (Crick, 2001; Faulks, 2000; Vasta, 2000). Writing in 1990 Ursula Vogel and Michael Moran pointed out that:

'In this last decade we have witnessed a remarkable revival of interest in the idea of citizenship. In research 'citizenship' seems to have overtaken 'class', 'market' and even 'democracy' as the strategic concept of political science. No less striking is the general popularity that the concept enjoys in the wider arenas of public debate, and the way it has attracted attention from virtually all parts of the political spectrum (Vogel & Moran, 1991 p. x).

And writing ten years later Keith Faulks suggests that citizenship has become a buzzword and 'like so many ideas that share that dubious honour, it is often misunderstood' (Vasta, 2000 p ix). He then goes on to point out that citizenship has an almost universal appeal and that:

'...radicals and conservatives alike feel able to utilise the language of citizenship in support of their policy prescriptions. This is because citizenship contains both individualistic and collectivist elements' (Vasta, 2000 p. 1).

All parties have laid claim to citizenship and democracy in support of their ideological struggles. However, the liberals and libertarian conservatives may well have been more successful than movements of the left in claiming the democratic highground. Thus, Jost Halfmann argues that:

'The neo conservatives have seized an idea which the left has largely given up, namely, that bourgeois democracy and the capitalist mode of production stand in precarious and immanently immutable relations of tension to each other. The difference made by the conservatives is that they hold the welfare state and mass democracy rather than the productive relations responsible for the evils of modern societies' (Halfmann, 1985 p. 174).

And Henry Giroux states that:

'The contemporary agony surrounding radical politics is most evident in its failure to take seriously, and in some cases even acknowledge, the politics of citizenship over the past twenty years or, for that matter, to reconstruct a conception of radical democracy that could provide an alternative to the New Right's attempt at redefining the nature and quality of political life in the United States and elsewhere' (1988 p. 5).

Following Giroux in this chapter, I argue that:

'... the notion of citizenship needs to be reclaimed by progressives and radicals as an important terrain of struggle. Moreover, such a struggle needs to be seen as part of a wider effort to develop a public philosophy that provides legitimation for developing counterpublic spheres in which a critical notion of citizenship can be given expression through a radical model of citizenship education. In this case the notion of citizenship must be removed from forms of patriotism designed to subordinate citizens to the narrow imperatives of the state. On the contrary, citizenship in this case becomes a process of dialogue and commitment rooted in a fundamental belief in the possibility of public life and the development of forms of solidarity that allow people to reflect and organize in order to criticize and constrain the power of the state and to 'overthrow relations which inhibit and prevent the realization of humanity' (Keller, 1976 #219 p. 22 cited in Giroux, 1988 p. 5).

In order to reclaim the notion of citizenship, however, it is first necessary to examine current practices, and to this end this chapter will identify the kinds of adult education programmes for active citizenship that have been offered in recent times. Following that, we will be in a position to examine the kinds of traditions which have influenced the development of these programmes.

Findings

General

In the introduction, it was pointed out that a previous publication (Tobias & Henderson, 1996) has identified key trends and patterns in the provision of lifelong learning and adult education programmes for active citizenship in the late-1980s and early-1990s. There was a resurgence of collective self-education, generally taking place within the context of social movements. The overall number of educational programmes for active citizenship increased substantially over the period, from 249 in 1983 to 471 in 1991, before falling away to 324 in 1995. It should be noted that educational programmes for active citizenship constituted only 8% of all

educational programmes for adults identified over the period and that the proportion fell from 10% in 1983 to 5.6% in 1995. Most of these were organised by 'non-educational' groups i.e. groups that did not have lifelong learning and adult education as a primary function. Sixty-six percent of all educational programmes for active citizenship were organised by 570 of these groups. Fourteen percent were provided by voluntary adult education organisations and 12% by educational institutions, with the balance being arranged by state and local authority organisations. Much of the increase in activity in the late-1980s and early-1990s can be attributed to the actions of 'non-educational' voluntary organisations and groups. Between 1983 and 1991, the number of programmes organised by these groups increased from 175 to 321. It then fell away again somewhat to 298 in 1995.

Although the overall contribution made by educational institutions and voluntary adult education organisations to adult education for active citizenship was relatively small, it was not insignificant. This is particularly evident if we focus on the provision of longer courses, classes and discussion groups, and exclude single meetings, demonstrations and workshops. Educational institutions and voluntary adult education organisations between them organised 70% of these longer programmes over the period.

Educational institutions

A total of seven secondary schools and five tertiary institutions contributed 279 programmes of adult education for active citizenship during the years under review.

Schools

Seven out of the 14 schools in Christchurch that received state funding for community education contributed 41 programmes of adult education for active citizenship over the seven years covered by this research. About half of these programmes were organised by one central city school, Hagley Community College, which has an historical commitment to adult and community education. Issues addressed included 'What's happening to jobs?', 'The Educational Reforms', 'A beginner's guide to New Zealand politics', 'Women in History' and 'Lesbian Perspectives'.

Christchurch Polytechnic

Christchurch Polytechnic contributed 69 programmes of adult education for active citizenship. It led the way especially in the mid-1980s in addressing gender issues. This was achieved primarily through its Next Step Centre (which built up a very wide range of programmes for women), but also through other programmes for both women and men. Forty-one of the polytechnic's 69 programmes focused on gender issues. They covered a wide range of issues

that affect women's lives and included courses or seminars on such topics as: 'Women's issues', 'The male system', 'Women and politics', 'Women and the bomb', 'Women and current affairs', 'What is Feminism?', 'Aids and women', 'Issues for working women', 'Women's lives', 'Midwifery options' and 'Women and the health system'. It should be noted however that fewer programmes for active citizenship were organised by the Christchurch Polytechnic in the 1990s with only five programmes addressing gender issues being identified during this period.

To a much smaller extent the polytechnic also led the way in providing nine programmes focusing on media issues. These included programmes on the 'News media', 'Children and television' and 'Assessing the media'. Other active citizenship programmes identified as being offered by the Christchurch Polytechnic covered most other areas identified. They included a few courses for active trade unionists and seminars on 'Employment contracts', 'Welfare rights and the law', 'Sustainable food ecosystems', 'Women, the environment and the economy' and 'Which way Canterbury?'

University of Canterbury

A total of 130 programmes of adult education for active citizenship organised by the University of Canterbury were identified in this research. Thirty-six of these were single public lectures or seminars organised by departments or by student groups and intended primarily for university participants. Ninety-three of them, however, were organised by the Centre for Continuing Education primarily for members of the public or professional groups outside the University. Twenty-four programmes addressed environmental issues. They dealt with such topics as 'Energy, politics and society', 'Current issues in resource management', 'Trees as an urban resource', 'Organic food production', 'Radioactivity in our environment', 'The national parks in New Zealand', 'Alternative energy systems', 'Biology and management of rivers', 'Resource management: what now?', 'The shape of the future', 'Endangered species', 'Sustainable energy', 'Engineering and the environment' and 'Malls and inner city development'.

Twenty programmes addressed economic and social policy issues. They covered a wide range of topics including 'Economics and the New Zealand economy', 'The family courts system', 'Adoption today - current trends', 'The new residential tenancies act', 'Measuring poverty', 'Child protection', 'Children's rights and the welfare of children' and 'Community action'.

Sixteen programmes addressed issues in international affairs. They included: 'The Middle East in crisis', 'Socialist societies of East Asia', 'France in the Pacific: colonisation and de-colonisation', 'Development inequalities of the third world', 'Conflict in the Middle East', 'The Rushdie affair' and 'Fiji: multiculturalism, democracy and development'. Thirteen

programmes addressed gender issues. They included: 'Perspectives on women: an interdisciplinary approach', 'The female experience', 'Women reshaping culture', 'Women and religion', 'Public and private worlds', 'Women's thinking - men's world' and 'In a different voice: feminist perspectives in philosophy'.

Twenty-one programmes dealt with general and political issues. They included: 'The police and social conflict in New Zealand', 'The eclipse of Equality', 'Democracy, mass culture and the arts', 'Power and people: issues in New Zealand politics' and 'The changing law: real people, real problems and new law'. Nine programmes focused on Maori or bi-cultural issues. Topics included 'Land, language and culture: the Maori in the modern world', 'Maori oral traditions' and 'Biculturalism: issues of interaction between Maori and Pakeha'. Finally, in addition to those already referred to, three programmes specifically addressed peace issues and three focused on educational issues.

Other Tertiary institutions

Three other tertiary institutions contributed a total of twenty-four programmes of adult education for active citizenship during the seven years covered by this research. Lincoln University, a constituent college of the University of Canterbury until 1991 when it became an independent University, contributed 12 Programmes. As befits a former agricultural college, most programmes focused on horticultural and environmental issues. The Christchurch Clinical School of Medicine, a constituent school of the University of Otago, contributed ten programmes, all on health issues. In addition, Christchurch College of Education contributed a total of eleven programmes.

Voluntary Adult Education Organisations

Fourteen voluntary adult education organisations and community groups were identified that contributed a total of 298 programmes of adult education for active citizenship during the six years covered by this research. Five general interest adult education organisations including the WEA were identified along with nine special interest adult education groups. Seventy-three percent of the programmes, however, were organised by one organisation - the Canterbury WEA

Canterbury Workers' Educational Association (WEA)

The Canterbury WEA contributed a total of 216 programmes of adult education for active citizenship in the seven years covered by this research. In addition, 41 programmes were arranged in co-operation with other voluntary organisations and community groups. Seventy programmes organised by the WEA provided a general background on current issues or dealt

with a number of issues rather than focusing exclusively on one. They included programmes on the following: 'Current affairs', 'Current affairs in-depth', 'Social change and human belief', 'Socialism', 'Behind the news', 'Freedom! What is it?', 'Socialism and New Zealand today', 'Who's running this country?', 'Why vote anyway?', 'Focus on politics', Seminar marking Population Day and 'Victims of the State'.

The WEA also led the way in raising economic and social policy issues for discussion. Thirty-two such programmes were identified, 19 of which dealt with economic and employment issues. They included: 'Trade unions and politics', 'Public and private control in New Zealand', 'Unemployment: causes and effects' 'Issues affecting working people', 'The employment contracts bill', 'Disemployment' and 'The power of debt'. On social policy issues 13 programmes included: 'Understanding violence: the Roper report', 'Prison Reform: Te ara hou - The new way', 'Public housing' and 'What is happening to your welfare state'.

A third major strength of the WEA was its contribution in the field of international affairs. Many international and foreign policy issues were discussed within the context of its general current affairs programmes. In addition, a further 35 programmes dealt with issues in the field of international affairs. They included programmes on: 'Overseas aid and its implications', 'The struggle by Kanaks for independence in Kanaky', 'Star wars: will it work?', 'The religious background to the Arab/Israeli situation', 'Foreign affairs and defence: what is the relationship?', 'The Gulf crisis', 'The United Nations: a positive approach', 'Cuba today' and 'Foreign control'.

Many of the above programmes as well as some in the social policy field addressed peace issues. However eight additional programmes were identified that dealt specifically with issues of peace and violence. Sixteen programmes addressing environmental issues were identified. They included: 'Research and the conservation of birds', 'Environmental security: agenda for the 90s' and 'Environmental issues'. Health issues were the focus of ten programmes including: 'Soil and health', 'Employment, Education and Health', 'The World Health Organisation' and 'Women and health'. Eight Programmes addressed issues of biculturalism or racism. They included: 'Racism, multiculturalism and the WEA', 'The Treaty of Waitangi', 'Exploring culture' and 'Ngai Tahu land claims'.

Although no programmes focusing on gender issues were offered in 1983 or 1985, the situation changed in 1987. In addition to those on women's health already referred to, 23 further programmes addressing gender issues were organised during the latter part of the period under review. They included: 'Women and workers', 'Suffrage - not just a woman's affair' and 'International women. Finally, nine programmes addressing educational issues

were organised by the WEA. Most focused on post-compulsory education and included: 'What are we educating for?', 'Learning for life', and 'Literacy, learning and liberation'.

Locality or community-based organisations

Four community or locality-based voluntary organisations were identified that contributed 17 adult education programmes for active citizenship addressing a wide range of local issues. The most active of these organisations in the field of adult education for active citizenship was the Cracroft Community Centre. Each year from 1985 it organised some form of public celebration and meeting or forum to mark Women's Suffrage Day. In addition, one other programme was organised annually dealing with current issues. Other organisations that offered at least one programme were the Rangiora Adult Education Committee, Risingholme Community Centre and Linwood Community House.

Special interest organisations

Nine of the voluntary organisations had a special interest in one particular field or aspect of adult education. They arranged a total of 60 education programmes for active citizenship over the years. In relation to bicultural issues and issues arising out of the Treaty of Waitangi six programmes were identified which were organised by special interest voluntary adult education organisations, with four being organised by the Waitangi Action & Learning Coalition and Project Waitangi. They included protest action and other meetings focused on 'What the Treaty means'.

In the field of parenting and family life education, the Parents Centre and the Family Life Education Council contributed a total of 14 programmes focusing on public issues. These included programmes on 'Violence and aggression', 'TV and young children' and 'Alcohol and the family'. The College of Natural Medicine organised four programmes that addressed issues in the field of health. Two organisations concerned with theological and biblical education - College House (16) and the Bible College (2) - organised a total of 19 programmes on a wide range of issues. Programmes organised by College House included the following: 'Biomedical ethics', 'Process theology - ecology and environment', 'People, power and process', 'Women and world religions', 'What the Treaty of Waitangi means to you' and 'Feminist theology'. In addition, the New Zealand Institute of Management organised two programmes one on race relations and the other on economic growth.

The Kitchen Table, a women's economic awareness group that arose out of a WEA programme in 1987, organised a total of ten programmes between 1987 and 1991 on issues such as 'Health cuts and bad employers' and 'Socialism meets feminism'. By 1993, a new feminist adult education organisation, the Women's Learning Centre, was active. Six

programmes were organised that year and two in 1995 addressing such issues as 'Women's history', 'Invisible women', 'Women in politics', and 'Feminism and everyday life'.

Discussion

We have seen above some of the ways in which the various organisations in Christchurch contributed, or failed to contribute, to the field of adult education for active citizenship over the period covered by this research. Our findings suggest that some significant elements within the democratic tradition, which underlies the provision of adult education for active citizenship, were alive and well. At a time when there was a resurgence in the forces of multinational capitalism and when progressive and expansive concepts of citizenship were under attack from the New Right, there is evidence of considerable popular resistance and something of a counter-resurgence of democratic and progressive groups and movements, many of which were actively engaged in adult education for active citizenship.

Our findings confirm that, in spite of the growth in the number of private education and training establishments, they appear to have made no direct contribution whatsoever to the field of adult education for active citizenship. Although the number of adult education programmes for active citizenship grew substantially over the period, this growth could not match the growth in other forms of adult and tertiary education.

The evidence also suggests that 'non-educational' community groups and voluntary organisations mounted most of the campaigns to promote and defend citizenship rights and organised by far the largest number of programmes of adult education for active citizenship. Educational institutions and other voluntary adult education organisations played only a limited role. It may be argued therefore that the historical tendency to draw sharp boundaries between adult education organisations and programmes and those engaged in other forms of social and political action may be becoming increasingly problematic.

Nevertheless, the contributions of some of these educational institutions and voluntary adult education organisations were significant, especially in providing the more substantial programmes; and they should continue to be recognised. The WEA's contribution in particular was important, and the University of Canterbury's was only a little less so.

The evidence suggests that voluntary adult education organisations such as the WEA were somewhat less constrained than formal educational institutions in seeking to establish links with popular movements such as the peace movement and labour movement. Despite this, such organisations were subject to severe constraints. Pressures generated by limited

resources and the constant effort to raise funds inhibited such organisations as the WEA from engaging in some political activities. In addition, the WEA's liberal traditions, democratic base and the fact that its members include people of all political persuasions also limited the possibility of undertaking some forms of education and action that required political commitment. In spite of this, the WEA contributed to most if not all of the public debates and movements of the times. The essence of this contribution lay in its provision of a 'neutral platform' for public debate. For the most part, the WEA's role was that of exposing ideas, policies, structures and institutions to critical analysis rather than leading in the advancement and promotion of new ideas, actions and movements. Small special interest groups such as the Kitchen Table and the Women's Learning Centre appear to have been better placed to promote and foster feminist ways of seeing and thinking. Nevertheless, the WEA does appear to have played a role in the late 1980s, along with other groups and organisations, in keeping alive the democratic progressive and socialist traditions that the New Right was seeking to marginalise and erode.

The evidence suggests that most formal educational institutions tended to maintain their distance from popular campaigns and movements, from other organisations involved in adult education for active citizenship, and especially from those engaged in radical forms of adult education for active citizenship. It seems that no attempt was made, even in the liberal tradition, to offer a coherent and sustained series of programmes to examine the issues raised by the revolution in state policies during the 1980s and 1990s. There is little to suggest that any educational institution developed a coherent policy or strategic plan for the provision of adult education programmes for active citizenship. The evidence suggests that they undertook little if any systematic planning of their contributions to adult education for active citizenship, and in failing to do so, it may be argued, they served to legitimate the ideologies of the New Right and the forces of multinational capitalism.

There was one exception to the general principle that educational institutions tended to distance themselves from popular campaigns and movements. The Christchurch Polytechnic, which generally made a limited contribution to adult education for active citizenship, took on an important leadership role in raising the consciousness of women and men on issues of gender inequity. In addition, on occasions other educational institutions took on secondary roles in supporting groups involved in movement-based education. The kind and level of support varied from that of organising joint programmes to that of providing venues, 'tutor hours' and other resources to assist groups engaged in organising educational programmes for active citizenship.

Few educational institutions could draw on strong traditions of support for adult education for

active citizenship. Schools-based Programmes of adult and community education had grown serendipitously in the 1950s and 1960s with few clear-cut policies or statements of principle to guide them. Although new policies were being developed in the 1980s and early 1990s, most schools, with the one exception of Hagley Community Co demonstrated little if any commitment to adult education for active citizenship. Within the adult and community education programmes at most schools, traditions of conservatism and pragmatism reigned supreme.

Of all the educational institutions, it is the University of Canterbury that has the longest historical tradition of liberal engagement in adult education for active citizenship. It is therefore not surprising that it made a larger contribution than any other institution, in particular through its Centre for Continuing Education. This contribution especially in relation to environmental, social and international issues was a significant one. Despite this, however its contributions were uneven. It would appear that there was little systematic planning and that the provision of programmes hinged largely on the interests and commitments of individual staff members.

Conclusion

In this chapter I have provided a picture of the contributions of educational institutions and voluntary adult education organisations to the field of adult education for active citizenship in one city in Aotearoa New Zealand between 1983 and 1995 – a period of considerable social and economic upheaval. The picture is limited by the fact that considerations of space have precluded much discussion of trends. Nevertheless some tentative conclusions may be drawn.

From one perspective adult education for active citizenship was alive and well in the late-1980s and early 1990s. The period saw an increase in the number of social movements and ‘non-educational’ voluntary organisations and groups engaged in adult education for active citizenship. Much of this work drew on progressive or radical democratic traditions of adult education. Some of these movements, such as the anti-nuclear movement, were successful in the 1980s in achieving political and educational objectives, framing new discourses and re-drawing the boundaries of legitimate educational practice. Others, however, were marginalised, while in still others the outcomes were contradictory. This chapter presents evidence to suggest that, in spite of considerable pressures, including the withdrawal of state funding in 1991, voluntary adult education organisations such as the WEA continued within an active liberal-progressive tradition to offer a regular and consistent programme of adult education for active citizenship.

From another perspective the position of adult education for active citizenship was by no means as positive. Educational institutions varied widely in their commitment to adult education for active citizenship. Most formal institutions, drawing on conservative and pragmatic traditions of adult education, demonstrated little commitment, while those such as the Centre for Continuing Education at the University of Canterbury that were involved relied heavily on the interests and commitments of individual staff members in drawing on liberal traditions to determine programme directions. These traditions, grounded in discourses that de-politicised education, reinforced the apparent impermeability of boundaries between adult education and political action. We have also argued that the lack of coherent policies for the development of adult education programmes for active citizenship served to legitimate the ideologies of the New Right and the forces of multinational capitalism. Only in a few instances does it seem that major efforts were made by adult educators to break through the boundaries between adult education and political action, as well as between institution-based and movement-based forms of adult education for active citizenship. These instances demand further analysis and I hope to address this in the future.

Chapter 8¹

Neoliberalism and Civil Society: the impact of neoliberal policies on the Canterbury WEA, 1983-1999

Introduction

In the two previous chapters, I have examined the ‘curriculum of adult education’ in one New Zealand city. In particular, the focus of chapter 7 was on those educational programmes intended explicitly to promote awareness of public issues. A key finding of that chapter concerned the important role played by the WEA in the organisation of educational programmes for active citizenship. In the light of this, this chapter follows up on the previous account by looking more closely at the WEA and its contributions.

Background

The history of the national federation of WEAs in Aotearoa may be described as one of achievement and struggle. Achievements have included the many contributions made by WEAs to:

- the continuing education of working people;
- the promotion of adult education for social justice;
- the development and formation of social and educational policies addressing issues of equity;
- the provision of educational support for the trade union movement; and
- the promotion of policies which recognise the important roles of unpaid workers and NGOs in the political economy.

In spite of these achievements - and indeed perhaps because of some of them - WEAs have frequently struggled to survive in the face of external pressures. They have seldom been financially secure, with funding from the state being precariously dependent on the whims and fancies of governments. Except for a period in the 1930s and 1940s when a number of key members of the first Labour Government were ‘graduates’ of WEA tutorial classes, political forces have not favoured the WEAs.

Right-wing political parties have generally been unsympathetic, seeing WEAs as ideologically committed to a left-wing agenda. At the same time, the political left has also viewed them with

¹ This chapter draws substantially on the work undertaken by a group consisting of Daniela Bagozzi, Natasha Galt, Steve Jordan, Lorraine Petelo, Luke Trainor and myself as part of a review of the Canterbury WEA which was presented in November 2000. I am most grateful to these people as well as many others involved with the WEA for their contributions.

some suspicion, seeing them as having been captured by the interests of the reformist middle-classes. In addition, at various times in its history the WEAs have faced other kinds of dangers.

These have included competition with the very much more powerful institutional sector and the possibility of absorption by institutions such as the universities. Furthermore, the Cinderella status of the field of adult and community education in general has affected the WEAs, and moreover, with the expansion of tertiary education and the growth of credentialism in recent times WEAs have faced the possibility of further marginalisation.

In addition to these external pressures, a number of internal factors have also affected their vulnerability. Since its inception, WEAs have been characterised internally by controversy and debate. Within the organisation, this debate has focused on such questions as the organisation's aims, purposes and methods and the role of the WEA in promoting adult education for social justice. Some within the WEA have seen the promotion of discussion and debate on these and other fundamental issues as a distinguishing feature of the organisation, which marks it off from the more hierarchical educational institutions, which dominate the tertiary sector. WEA members in decision-making within the WEA have thus placed a very high value on full participation, since this is seen as the only course of action in keeping with a high level of commitment to social democracy.

"The Canterbury Workers Educational Association (founded in 1915) is an independent voluntary organisation within the Federation of Workers Educational Associations in New Zealand whose principal objective is the advancement, encouragement and provision of continuing and community education in accordance with Te Tiriti o Waitangi/ The Treaty of Waitangi." In accordance with this central clause of the constitution, the WEA offers a programme of education at low cost as its role in the community. Its integration in the Federation, which includes ten WEAs and the Book Discussion Scheme with hundreds of groups, is not a simple organisational convenience. Beyond this, the constitution extends further to embrace the international federation of the WEA movement, present in some fifty countries.

The Canterbury WEA is obliged to follow democratic principles and practice directed to a just society. Its programmes and activities are based on participatory learning methods: on people coming together as equals to gain the knowledge and understanding they need to fulfil themselves individually, and within their workplaces and communities.

The controlling body of the association, which meets monthly, is the Council, which is made up of officers, elected by the members and by community representatives. The executive, which meets fortnightly, has an oversight of the day-to-day work of the WEA and prepares the Council agenda.

The Canterbury WEA employs a bookkeeper, cleaner, office worker and programme worker. In addition, it is dependent on the substantial amount of work undertaken by volunteers on an unpaid basis. Tutors provide many of the courses in the programme. Their contribution is crucial and they frequently offer their services at rates below those which they could secure elsewhere. Indeed, some donate their services.

The WEA Centre in Gloucester Street follows a four-term year. Other groups also use the facilities and joint meetings and seminars are held with a number of these groups. Overall, this represents a substantial community presence. The income of the Canterbury WEA was drawn from fees, donation, rent from the use of its property and funds and grants (e.g. the Community Trust, Lottery Board, Christchurch City Council and the Community Employment Group). It has been necessarily frugal in expenditure, leaving aside wages, it maintained low office costs and largely relies on publicity through free channels.

The purpose of this chapter is to summarise and reflect on some key overall programme, enrolment and membership trends and patterns in recent years. The data have been drawn from various sources including annual reports, brochures and office records. In some cases the data include all WEA courses, seminars and other events including those organised by the SE and NW Christchurch branches. In other cases, the data include only those activities organised at the WEA Centre in Gloucester Street.

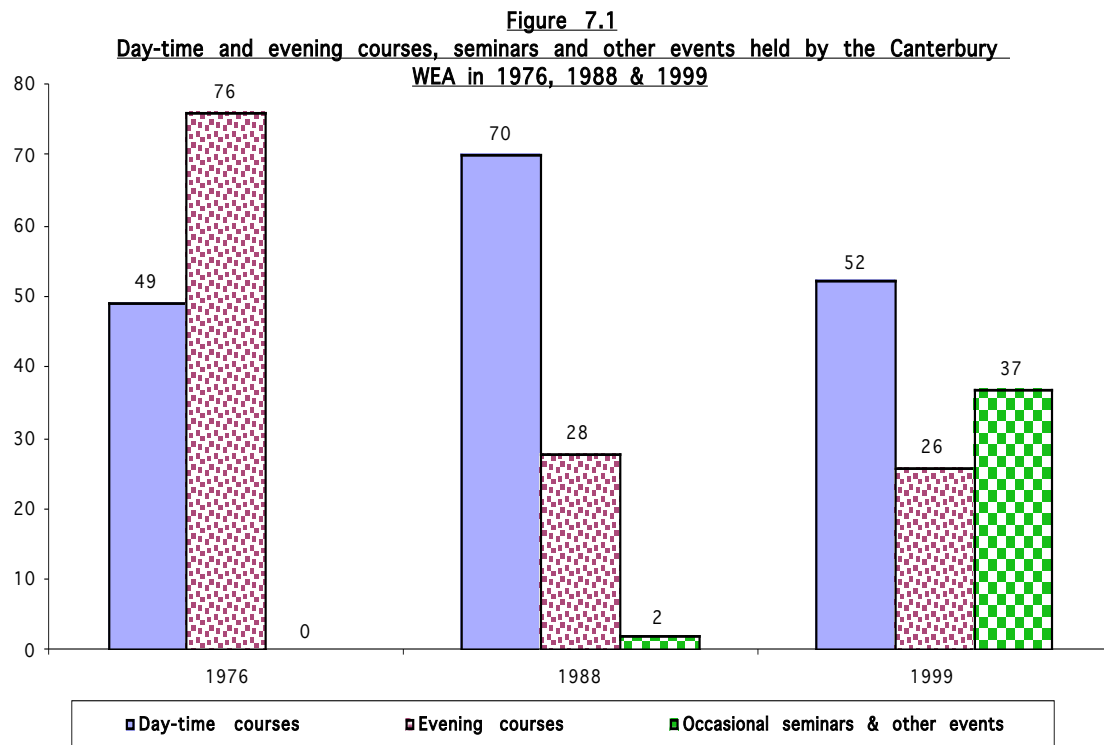
Trends and patterns in the number of programmes, enrolments and membership from the mid-1970s to the late-1990s

Figures 7.1 & 7.2 provide information on the number of courses, classes and occasional seminars, workshops and other events, together with enrolments for three selected years, 1976, 1988 and 1999.

In 1976, the Canterbury WEA held a total of 125 courses, seminars and other programmes (with 3,702 enrolments). Of these, 49 (or 39%) of the entire programme (with 2,459 enrolments or 66%) were 10-week morning classes, which made up the recently established 'Wider Horizons' programme.

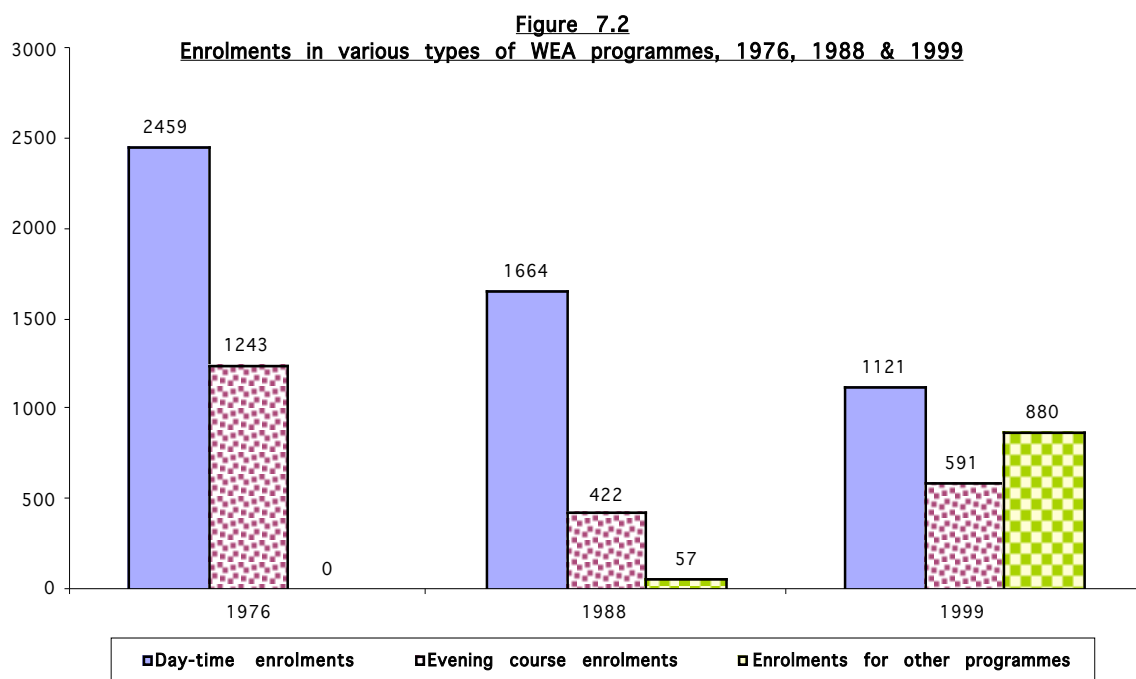
At that time, following a recent agreement with the Government and the Department of Education, the Canterbury WEA was able to call on the full-time-services of a Director of Community Education along with its share of a small state subsidy distributed nationally through the Federation of WEAs. In 1982, all government subsidies of WEAs were withdrawn. Although by 1986, the 4th Labour Government had partially renewed this subsidy,

the state-funded services of a full-time director had gone, and the WEA had become ever more



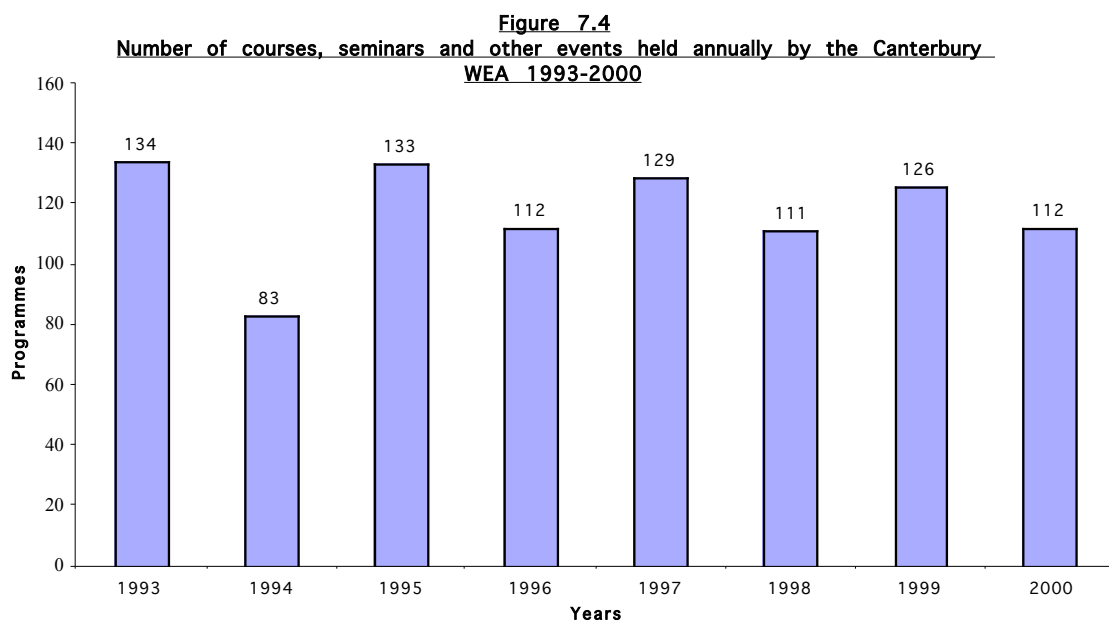
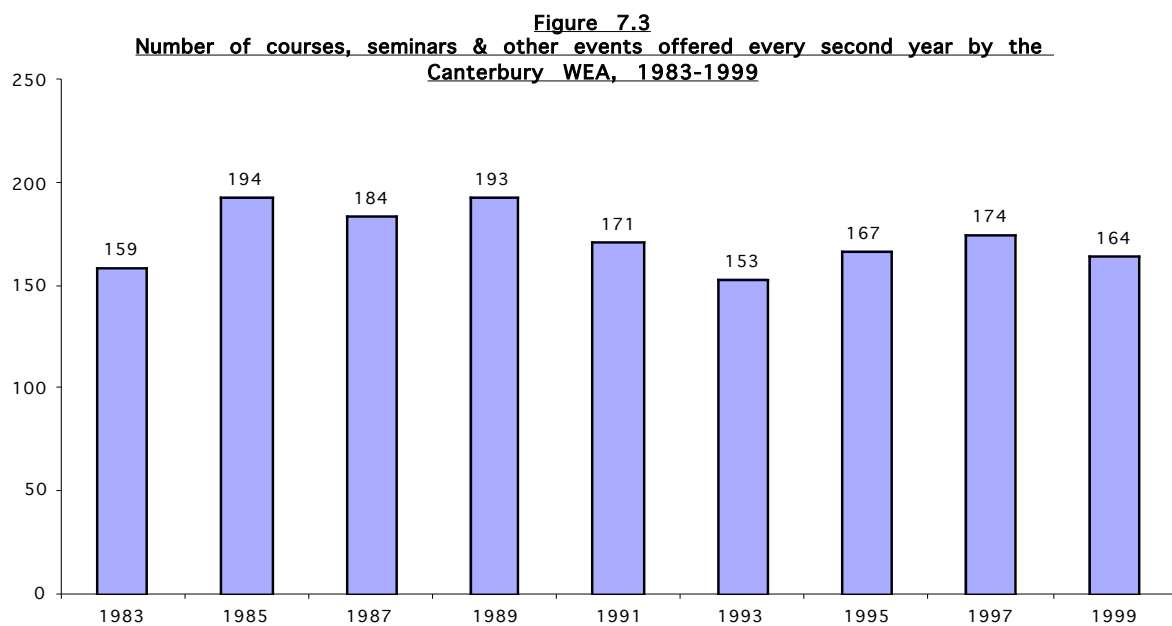
dependent financially on the financial support of foundations and trusts such as the Lotteries Grants Boards and the Mackenzie Foundation.

By 1988, the total number of programmes had dropped to 100 (with 2,143 enrolments). Of these, 70 courses comprising 70% of the total programme (with 1,664 or 78% of the enrolments) consisted of day-time courses. In its first budget in 1991, the new National

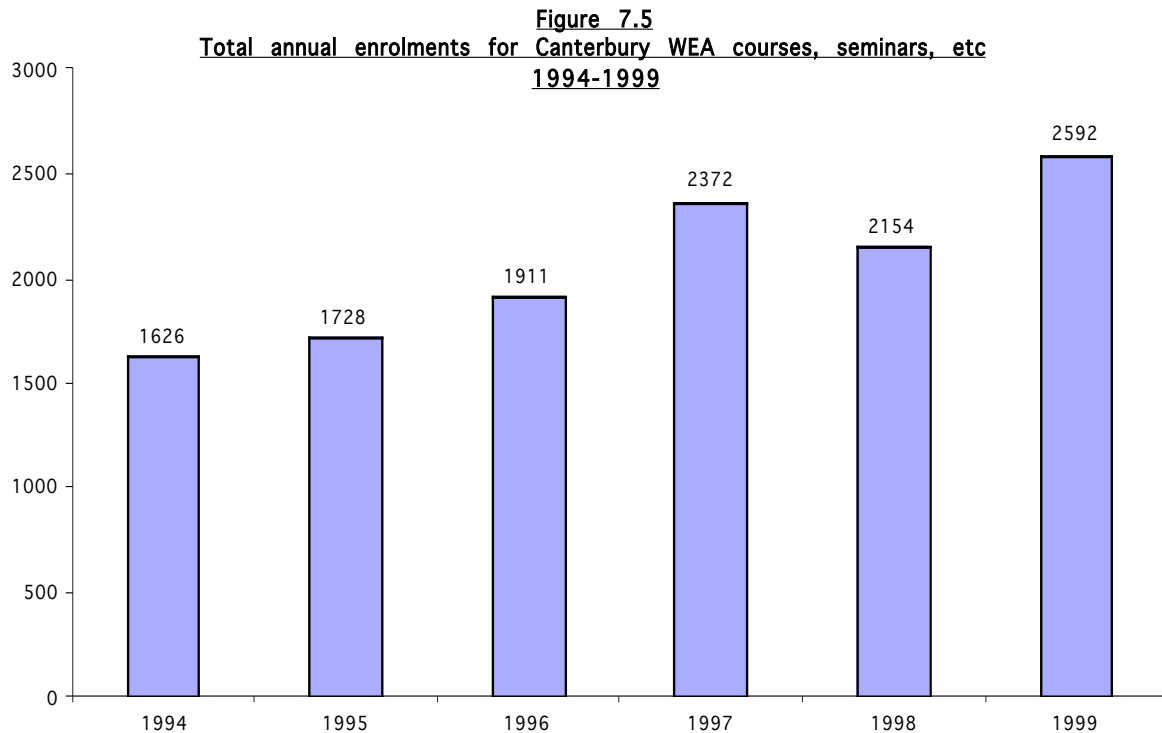


government announced the withdrawal of all state funding for WEAs and the WEA's financial survival was once again under threat. It is therefore remarkable to note that during the 1990s the number of programmes grew again to reach a total of 115 (with 2,592 enrolments) in 1999.

Figure 7.3 presents a more detailed picture of changes in the total number of courses, seminars, etc. organised and offered by the Canterbury WEA every second year since 1983. This may be compared with the picture of courses, seminars, etc which actually went ahead in the 1990s as presented in Figure 7.4.



In addition, Figure 7.5 presents information on annual enrolments between 1994 and 1999.

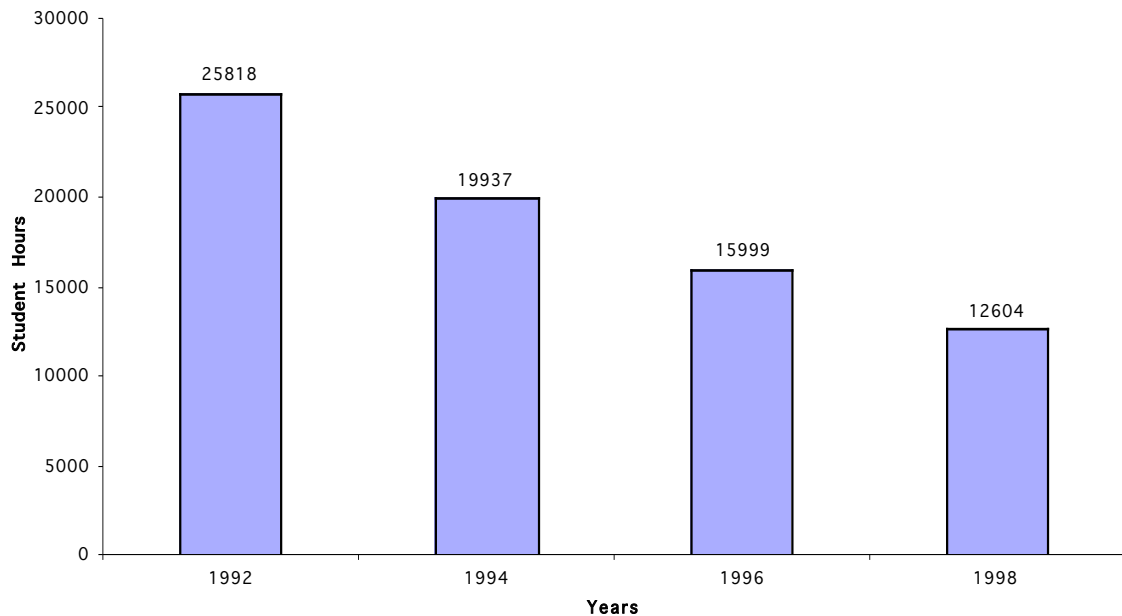


The picture which seems to emerge from these graphs is one of little change in the overall productivity of the Canterbury WEA over this period. There would appear to have been little change in the overall number of programmes offered and actually held each year over the period. Moreover, the number of enrolments appears to have risen significantly during the 1990s. This then presents a picture of very positive recent trends in the face of considerable financial difficulty. The removal of state subsidies and the increasing commodification of much education, along with the growth in credentialism, seem to have little impact on the number or kinds of programmes offered and actually held by the Canterbury WEA. This suggests that those associated with the organisation who set out to resist the power of the state and the newly emerging educational market did succeed over the period in maintaining a viable programme.

On the other hand, it does appear that there are also some other less positive trends. Figure 7.6 presents data on the rapid fall in student contact hours in the 1990s. At first sight, it would seem difficult to reconcile this with the pictures presented in previous graphs. The explanation

lies in the reduced length of many programmes.

Figure 7.6
Student/Hours per Annum, 1992, 1994, 1996 & 1998



In 1996, the Canterbury WEA, along with schools and most community education providers, moved from a three-term to a four-term year. Each term since then has been somewhat shorter than had previously been the case, and this, along with the increase in the number of one-off seminars and lectures would certainly explain some of the reduction in student hours.

Perhaps more significant, however, from the point of view of the long-term future of the Canterbury WEA is the long-term drop in WEA membership reflected in the data presented in Figure 7.7.

Figure 7.7
WEA Membership, 1976, 1988, 1989 & 1999



This drop in membership is already having a significant impact on the WEA as an organisation, not least in the increased pressures being experienced by a small number of committed people and in the reduced attendances at council meetings.

Four striking trends may be identified on the basis of the above discussion.

Firstly, in spite of the financial difficulties confronted by the WEA over the years and its marginalisation within the government policy framework described elsewhere (see especially chapter 8), the Canterbury WEA appears to have continued to offer a substantial programme which serves a significant number of people. Moreover, in spite of all the changes, it should be noted that the number of programmes held in 1999 was remarkably similar to the number held in 1976. Only 8% fewer programmes were held in 1999 than in 1976.

Secondly, although enrolments in 1999 were very much lower than those achieved in 1976, there were in fact signs of something of a revival in enrolment numbers following some lean years in the late-1980s and early-1990s.

Thirdly, however in spite of these positive trends there are in fact some other trends that are not as positive. Most notably the number of WEA members has fallen steadily, and in recent times there appears to have been a substantial decline in the total number of student hours per annum.

Fourthly, the above discussion highlights the different trends in the provision of day-time, evening and 'one-off' seminar, workshop and lecture programmes over the period. It points to the recent revival of both the evening programme and the programme of seminars and other events, together with some falling away of the morning programme.

Patterns of change in the Canterbury WEA curriculum from the 1980s to the 1990s

If, as has been suggested in the previous section, the Canterbury WEA in the 1990s succeeded in resisting the power of the state and the demands of the market for credentials, etc, has this resistance and the survival of the organisation been bought by selling the soul of its programme? Does the evidence suggest, for example, that the WEA's programmes in the 1990s have been less focused on social, economic and political issues than those in the 1980s? Has the WEA been less committed to issues of social justice than in the past?

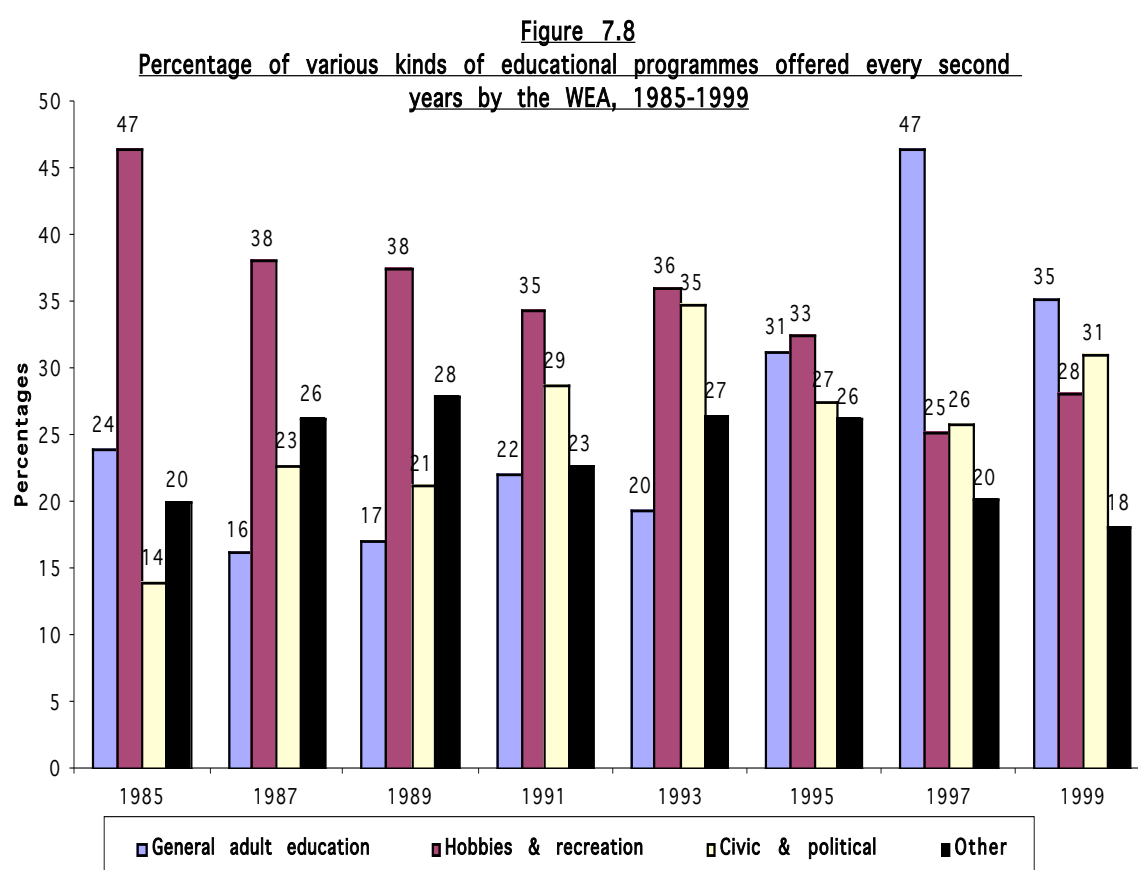
This section provides an overview of trends in the provision of various kinds of programmes that have been offered by the Canterbury WEA in recent years. In other words, it examines

changes in the ‘curriculum’ of the WEA and is intended to throw light on these questions. To achieve this, a data-base was established which included information on every programme offered by the WEA over a period of time.

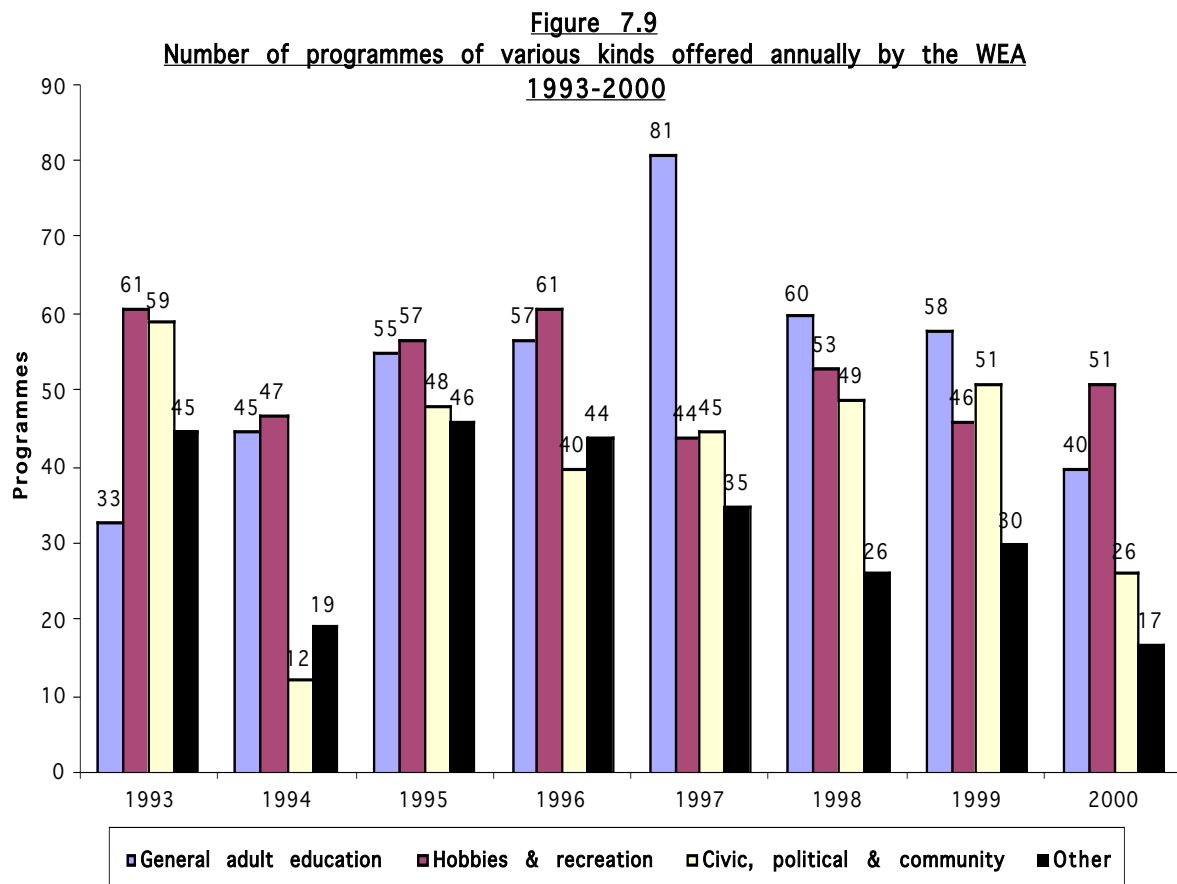
These programmes were coded according to programme type and for the purpose of this analysis the following four categories of programme type have been used:

- general adult education e.g. literature, languages, history, the arts, music and art appreciation, philosophy, religions, sociology, psychology, etc.
- hobbies and recreation, includes all practical arts and crafts other than those which were clearly job-related, sports and games-oriented programmes;
- civic, political & community, includes all programmes dealing with social, economic and political issues, current affairs, community development, working with groups, etc.; and
- other, includes job-related programmes, ABE and literacy, home and family life programmes personal development, fitness, relationships, etc.

Figure 7.8 presents a picture of the percentage of programmes offered in each of the above four categories every second year from 1985 to 1999, while Figure 7.9 presents a picture of the number of programmes offered annually between 1993 and 2000. It is important to note



that any particular course or seminar could be coded in more than one category.



The data here suggest the following:

Firstly, there was a remarkably high level of consistency in the kinds of programmes offered over the fifteen-year period from 1985 to 2000. The actual courses and seminars offered of course changed to reflect the changing times, but the distribution of the various kinds of programmes remained remarkably similar from year to year.

Secondly, the proportion of the WEA's programme which consisted of general adult education courses, seminars, etc rose slightly from 18% in 1983 and 24% in 1985 to 35% in 1999. However, through much of the 1990s there was little change in the number of general adult education courses offered from year to year.

Thirdly, the proportion of the programme focused on hobbies and recreational activities fell consistently from 53% in 1983 to 28% in 1999. The fall was particularly marked in the 1980s

and was possibly occasioned by the growth in the number of short courses in this area in the schools at that time. The actual number of these kinds of programmes which were offered changed very little in the 1990s.

Fourthly, it seems that the proportion of the programme focused on civic, political and community issues rose from 19% in 1983 to 31% in 1999. Although the Canterbury WEA may have been at its most active in providing educational programmes addressing public issues in the late-1980s and early-1990s, it would appear that it was nevertheless somewhat more active in providing these programmes in the mid- and late-1990s than it had been in the early- and mid-1980s.

Conclusion

In light of the above analysis, it does seem that the Canterbury WEA did not have to sell its soul for the sake of survival during the 1990s. It seems to have maintained its commitment to the provision of public issues programmes. In view of the pressure on resources, this consistency of commitment is quite remarkable and is a tribute to the small group of unpaid and paid workers who struggled to maintain it. On the other hand it may be argued that this survival was only possible at this time because the WEA had long since been marginalised and ceased to pose any significant threat to the interests of capital or the state. There was little if any space within the framework of the Canterbury WEA to promote significant counter-hegemonic programmes of reflection and action. Under governments in the 1990s which were heavily influenced by neo-liberal ideologies, progressive organisations such as the WEA could not be funded by the state, but they could be left to exist on their own resources out on the margins.

Chapter 9¹

Lifelong learning under a comprehensive national qualifications framework - rhetoric and reality.

Introduction

This chapter explores some of the critical questions arising out of the massive changes which have taken place in post-compulsory education and training in Aotearoa/New Zealand in recent years. In particular, it focuses on the establishment of the new qualifications framework within the specific economic and political context of the late-1980s and early 1990s and the implications for lifelong learning and adult education. The New Zealand Qualifications Authority, which gave birth to the framework, is but twelve years old, and yet, in this relatively short time-span the new authority and its framework have generated a substantial body of descriptive, analytical and critical literature from a wide range of perspectives (Codd, 1997; Irwin, Elley, & Hall, 1995; Ministry of Education, 1997a; New Zealand Qualifications Authority, 1991a, 1991b, 1992; Olssen & Morris Matthews, 1997; Peddie, 1996; Roberts, 1997; Viskovic, 2000). Only a few of the studies (Peddie, 1996; Viskovic, 2000) however, have focused on the lifelong learning and adult education perspective.

The new framework was designed to be more comprehensive in scope than anything comparable elsewhere in the world. Its protagonists saw in it the basis of a system that offers new incentives to everyone to learn and a vast extension of educational and training opportunities to people of all ages - truly a system of lifelong learning, focused on meeting the needs of the individual learner. Whilst not rejecting the progressive aspects of the reforms, this chapter seeks to expose some of the realities, which may be too readily ignored, as governments and planners engage in the rhetoric of utopian thinking. In particular, in the first place, it examines some of the ways in which the historical and material conditions of late-capitalism, and the discourses to which these conditions give rise, are influencing the changes, and in the second place it undertakes a critique of ideologies underlying the reform process.

Background

Massive changes have taken place in New Zealand Aotearoa over the past dozen years or so across the whole field of post-compulsory education and training. These changes include the establishment of a comprehensive national qualifications framework as a key component of

¹ This chapter is based on an article which was published in the International Journal of Lifelong Education 18 (2) 1999. I am grateful to the editor and publishers for permission to draw on this material.

the education system as a whole, and of Skill New Zealand in particular. They also include the introduction of Units of Learning, Records of Learning, mechanisms for the recognition of prior learning and for the recognition and accreditation of work-based learning. In support of these changes, a number of claims have been made. Among other things, it has been argued that the changes will promote and encourage many more people to continue their learning, that individuals will have greater control over their learning, and that individual learning needs will be met more effectively.

The purpose of this chapter is to explore some of the critical questions arising out of the changes. These include the following: 'What are the forces driving these changes?' 'Will policies and practices be more 'learner-centred' or 'client-centred' than they have been in the past?' 'Will they result in greater personal autonomy and control?' 'Will they meet people's 'learning needs' more effectively?' In particular, the chapter focuses on the establishment of the new qualifications framework within the specific economic and political contexts of the late-1980s and early-1990s. Whilst not rejecting progressive aspects of the reforms, the chapter exposes some of the realities which may too readily be ignored by governments and planners engaged in utopian thinking. My aim is to further our understanding of the ways in which the material conditions of late-capitalism, and the discourses to which these give rise, influence such changes. The first part of the chapter outlines some of the changes and describes the economic and political context. The data on the economy and the labour market are drawn from a range of official publications of Statistics New Zealand. The chapter then addresses some of the questions raised by current changes, with special reference to the new qualifications framework.

The chapter draws on and seeks to extend the work of John Field (1991) who undertook a critique of the competency-based movement and the new qualifications framework in Britain, and Richard Edwards (1991; 1993). Basing his arguments on the work of Foucault, Edwards argues that there is no way of escaping the political dimensions of educational practices and decision-making. In the words of Foucault:

'Power and knowledge directly imply one another: ... there is no power relation without the correlative constitution of a field of knowledge, nor any knowledge that does not presuppose and constitute at the same time power relations' (1977).

This insight of course pre-dates Foucault. Karl Marx was very aware of it in the 19th Century, and more recently, Freire (1972; 1973; 1985) among many others has drawn attention to it. One of the ways, however, in which Foucault differs from Freire is that he argues that power may be productive as well as oppressive, that it may be positive as well as negative, and that power relations both produce and are reflected in the dominant discourses in any social

formation.

In order to understand the changes taking place in the political economy I have drawn on the work of a number of people including Andre Gorz (1989) and Manuel Castells (Castells, 1996). Gorz argues that within a short time-frame 25% of the labour force internationally will be in 'core' jobs, 25% in 'peripheral' jobs, and fully 50% in 'external' jobs. He elaborates as follows:

'The advance of technology has resulted in the segmentation and disintegration of the working class ... the great mass of workers have become marginalized or lost their job security ... Enterprises are adopting a strategy of flexible responses on two levels simultaneously: the firm's stable core of employees must be functionally flexible; the peripheral workforce, for its part, must be numerically flexible ... The stable core must accept occupational mobility, both in the short term (changing their positions and acquiring new skills) and in the long term (retraining and modifying their career plans), in exchange for job security ... The peripheral workforce is divided into two groups: the first is employed on a permanent basis to do administrative jobs ... but it is not highly skilled and can be renewed, enlarged or replaced at will by recruiting from the ranks of the unemployed. This source also provides a second group of peripheral workers, employed on a temporary and (often)... part-time basis, as economic conditions demand ... Lastly, there is the external workforce, which includes extremely highly skilled professionals ... as well as workers with no particular skills ... and the large, fluctuating workforce occasionally employed by subcontractors' (Gorz, 1989 pp. 66-67).

Castell's thesis is very different from that of Gorz, and in particular, he rejects all notions of technological determinism. Nevertheless, he does argue in a somewhat similar fashion that '...a fundamental transformation of work, workers and work organizations ...' (Castells, 1996 p. 272) is currently taking place, and he goes on to distinguish between 'core', 'disposable', and 'externalised' forms of labour. He writes:

'The prevailing model for labor in the new, information-based economy is that of a core labor force, formed by information-based managers and by 'symbolic analysts', and a disposable labor force that can be automated and/or hired/fired/off shored, depending upon market demand and labor costs. Furthermore, the networked form of business organization allows outsourcing and subcontracting as forms of externalizing labor in a flexible adaptation to market conditions' (Castells, 1996 p. 272).

The new qualifications framework

The new qualifications framework holds out what appears to be a brave new educational world. In its booklet introducing the framework, the New Zealand Qualifications Authority (NZQA) (1992) states:

New Zealanders must learn (my emphasis) to go on learning. It is crucial for the individual and the country that we have a qualifications system which encourages people to gain further skills and knowledge. The new Qualifications Framework...will include qualifications from senior secondary school right through to degree level. The aim is to have a network of qualifications which can be adapted for a variety of purposes. A flexible, accessible system will encourage people of all ages to follow programmes of learning that suit their particular needs (p 1).

The booklet discusses the reasons why a new qualifications framework is necessary and describes briefly the consultation procedures undertaken between October 1990 and September 1991 in developing the framework. It then goes on to note some of the advantages for learners:

These days, with changes in technology and difficult economic conditions, people may have to change their jobs or learn new skills several times in a lifetime. The new Framework will be a single streamlined system with programmes that are centred on the learner and cater for the changing needs of individuals (my emphasis) and of the country as a whole. Learners of all ages will be encouraged to go on learning, with due recognition for what they have already achieved (p 2-3).

The booklet then describes the structure of the framework and how it is expected to operate:

There will be eight levels in the Framework, from the equivalent of senior secondary education through to degrees. It will be possible for learning on the job to be part of the Framework. Qualifications will have a logical sequence of names. National Certificate will be the title for achievements from Levels One to Four - it will say on the Certificate which level the student has gained. National Diploma will be the title for Levels Five to Seven. Initial degrees will be placed at Level Seven, and other degrees, higher certificates and diplomas will be at Level Eight ... The building block of the Framework is the unit of learning. Learners will be able to select units which build into a nationally recognised qualification, and will be able to cross-credit units between qualifications and also between places of learning. This will give learners a

better choice of where and how to learn, and so encourage people to further education and training (p 3-4).

The rhetoric of the protagonists of the new system holds out a promise that it will go very much further than merely improving the framework of qualifications. On the contrary, it will affect every aspect of post-compulsory education and training. The promise is of a system of education and training that will be flexible, accessible and learner-centred - a system within which people of all ages and backgrounds will be able to determine their own learning programmes and shop around for providers who will deliver the kinds of learning units they need to achieve their goals - at times and in places which suit them. No longer will people face a myriad of mystifying regulations, rigid time-tables and other exclusionary devices set up to meet the needs of educational institutions and/or examining bodies. Prior learning will be recognised; learners will be able to identify in advance what competencies they can expect to achieve by enrolling for any particular learning unit; and learning pathways will be clear-cut and rational. The promise is of a system that will provide new incentives to learn and a vast extension of educational and training opportunities to people of all ages - truly a system of lifelong learning, focused on meeting the needs of the individual learner.

In light of all this, it may seem churlish to raise critical questions about the new system. After all, many of the ideals accord closely with those that have been espoused by progressive adult educators for many years, and the framework does indeed contain many progressive elements. There are however also regressive elements, which derive from the fact that the new system is driven by a number of contradictory forces.

Economic and political contexts

The past twenty years or so have seen major structural changes in the political economy both within Aotearoa New Zealand and internationally. During the 1970s and early 1980s, Aotearoa New Zealand slipped back on almost every measure of economic performance. From being one of the three or four wealthiest countries in the world in 1953, as measured by per capita Gross Domestic Product (GDP), it had slipped to eighteenth in 1982. Between 1960 and 1967, the average annual percentage growth in real GDP was 5.7% and between 1968 and 1975, it was 4.0%. In the following years, it fell substantially to 1.0% between 1976 and 1983. In addition, every year from 1973 on Aotearoa New Zealand had a balance of payments deficit. From 1974, the net overseas debt grew steadily until it reached more than 60% of GDP in 1984. In 1968 New Zealand experienced significant levels of unemployment (over 5,000 registered unemployed) for the first time since the 1930s, and despite fluctuations, unemployment rates continued to rise until in 1984 there were over 80,000 registered

unemployed.

Aotearoa was, of course, not the only country experiencing economic difficulties in the late 1970s and early 1980s. Nevertheless, its economic performance does appear to have been somewhat lower than that of most other OECD countries. In 1984 in response to a perceived fiscal crisis, the newly elected Labour Government adopted a number of measures that reflected the dominant neo-Liberal ideology. These included the floating of the New Zealand dollar, the lifting of foreign exchange controls, the abolition of restrictions on foreign ownership of financial institutions, the progressive removal of export subsidies and import tariffs, duties and restrictions, the broadening of the tax base with the introduction of GST (initially 10% but raised in 1989 to 12.5%), the lowering of company taxes and of marginal rates of income tax paid by those on high incomes, the reduction in the scope of the provision of a number of state services and of state expenditure on the provision of these goods and services, the promotion of 'user pays' policies, and the corporatisation and later privatisation of a number of state agencies and services. All these measures and others were designed to expose New Zealand institutions, both private and public, more fully to the competitive forces of multi-national capitalism.

What were the effects of these policies? On the one hand the annual increase in the consumer price index was brought down from a high of 13.2% in 1985 following the wage & price freeze of 1982-4 to 7% in 1990, and fell still further to below 2% in ensuing years under the impact of the monetary policy framework put in place in terms of the Reserve Bank Act of 1989 to reach 2.9% by December 1995. In addition, the state's fiscal deficit, which had exploded during the Muldoon years partly as a consequence of a series of 'Think Big' projects, was substantially reduced from 6.9% of GDP in 1984 to 1.2% in 1990 before rising again to a little over 4% by 1995. On the other hand, in spite of the neo-liberal rhetoric and the realities of major restructuring, New Zealand's economic position relative to other OECD countries continued to deteriorate. Between 1984 and 1994 New Zealand's per capita GDP declined by almost 10% relative to the OECD average between 1984 and 1994 and its net overseas debt crept up to 76.5% of GDP in 1995. Its economic growth rate was low, with an average annual growth in real GDP of 1.4% between 1984 and 1991, and 3.1% between 1992 and 1996. Moreover most years have seen a balance of payments deficit with the net overseas debt continuing to grow to 68.9% of GDP in 1991 and 85% in 1996 (Economic and Development Review Committee, 1996; Statistics New Zealand, Various-b).

Labour market changes

1985 and 1986 saw some growth in the number of jobs, together with a fall in the rate of

unemployment from 5.7% to 3.8%. However, from 1987 all that changed. Between 1987 and 1992, about 100,000 jobs were lost, mainly in manufacturing and the re-structured state services. Linked with this was a rapid rise in unemployment from 73,500 or 5.5% in 1987 to 172,200 or 12.1% in 1991. Since then this trend has once again been reversed, with overall levels of employment in 1995 returning to the levels last seen in 1988, and the unemployment rate falling to 6.3%.

The period since the early 1980s and particularly since 1987 has also seen a number of major changes in the structure of the labour market. Amongst other things, there has been a substantial increase in the number and proportion of women in the labour force as well as in the number and proportion of people employed in part-time jobs. Indeed, whereas the number of people in full-time jobs i.e. working 30 hours or more per week decreased by 3.6% between 1987 and 1995, the number working 1-29 hours increased by 28.9%. In 1981, 115,140 people or 8% of the total labour force were employed in part-time work. By 1987, this figure had increased to 264,700 or 17.1% of the total labour force, and this trend has continued so that eight years later in 1995 341,300 people or 21.6% of the labour force were employed part-time. Although the number of women in full-time jobs and men in part-time jobs have both increased in recent years, women constituted only 35.6% of the full-time labour force in 1995 as compared with 36.3% in 1991, 34.1% in 1986 and 34.2% in 1981. On the other hand, the overwhelming majority of part-time workers are women: they constituted 74.9% of the part-time workforce in 1995, 75.4% in 1991, 77.0% in 1986 and 82.6% in 1981.

In addition, following the passage of the Employment Contracts Act by the National Government in 1991, further casualisation of jobs has taken place. There was also a continuation of the long-term shift in employment from the primary and secondary sectors to the tertiary sector, with a particularly sharp fall-off in manufacturing. Such growth as has taken place has been in the business and financial sectors and in low paid frequently part-time jobs in the retail trade and in community, social and personal services. Linked with this has been a falling off in the number and proportion of unionised workers. There has been a dramatic increase in under-employment. The number and proportion of workers in part-time jobs seeking either longer hours or full-time jobs has increased substantially over the last ten years. In 1987, 38,800 or 14.7% of part-time workers were actively seeking full-time work or longer working hours. By 1990, this had risen to 49,000 or 29.6%, and by 1995, 117,800 or 45.0% of part-time workers were under-employed (Statistics New Zealand, Various-a).

The process of educational reform

Earlier in this book, as well as in a previous publication (Tobias, 1990a), I have reviewed the

extensive process of negotiation and consultation over educational reform, which took place under the Labour Government between 1984 and 1990. This period saw the failure of progressive forces to develop a coherent programme for the development of lifelong learning and adult and community education. This failure arose in part out of fragmentation of the field which had long historical roots, but which was exacerbated by turbulent events in the early 1980s. The mid-1980s also saw the rise to dominance of neo-liberal, managerialist and technicist ideologies, and continuing struggles between these elements and the disparate forces seeking to preserve the welfare state and regain the rangatiratanga of Maori peoples under the Treaty of Waitangi. As we saw earlier, the Education Amendment Act of 1990 provided the legislative basis for many of the succeeding changes, including the establishment of NZQA, with a mandate to set up the new framework. This legislation may be seen as an outcome of these struggles, reflecting a compromise between the main opposing forces.

Within six months of this Act being passed by Parliament, the fragile compromise fell apart. A National Government dominated by conservative and New Right forces came to power. This resulted almost immediately in a range of initiatives and programmes which constituted a direct attack on the welfare state. Within a context of record levels of unemployment and under-employment, massive benefit cuts, increasing moves to privatise health and education and further impoverishment of many New Zealanders, the agencies established under the 1990 legislation were commencing their operations. It was not an auspicious moment.

In response to a NZQA discussion document, the Waitaha/Canterbury Branch of the Adult and Community Education Association of Aotearoa/ New Zealand (Waitaha/Canterbury Branch, 1991) was but one of several organisations to sound a cautionary note. Amongst other things, attention was drawn to some of the dangers inherent in the growth of credentialism. It was pointed out that research suggested that there is no direct link between a workforce with qualifications and one that is skilled - people can be skilled without being qualified (Berg, 1970; R. Collins, 1977). It was further pointed out that there is little or no evidence to suggest that the growth of certificates and diplomas is linked directly with any of the wider goals of education. The argument was made that learning which goes on outside the qualifications framework – including credit-free education - is important and legitimate. Concern was expressed that as a consequence of the establishment of the new framework, learning and education programmes that do not fit within it will not be recognised and hence will not be funded.

These representations made little impact on the thinking of NZQA, which saw itself as spearheading a profoundly important, progressive reform. It would appear, however, that progressive elements associated with NZQA failed to take into sufficient account not only the

reductionist and managerialist tendencies inherent in the technicist ideology underpinning many aspects of the qualifications framework, but also the power of external political and economic forces in shaping the directions taken in developing the framework. Within the context of Aotearoa New Zealand in the early 1990s, it is not surprising that these directions appear to have been largely reactionary. The level of state funding of educational institutions and agencies such as NZQA was steadily eroded. These institutions and agencies were forced to raise their fees and charges. At the same time, the state became involved in the privatisation of post-compulsory education and training; and NZQA, as the state agency responsible for accrediting private providers, necessarily came to play a key role in legitimating the process of privatisation. In addition, the passage of the Industry Training Act in 1992 and the launching of Skill New Zealand, designed to bring 'industry', NZQA and the state's Education and Training Support Agency into closer partnerships, served to highlight some ways in which the qualifications framework was expected to 'meet the needs of the capitalist economy'.

A critique of ideologies underlying the reform process

Thus far, we have examined some features of the political economy that have had an impact on the reform process. It remains to examine further the ideologies that underpin the new system. An ideology of individualism pervades it. The needs of individual learners are seen to be at the heart of the new system. It is claimed that it will increase the accountability of educators and institutions, while extending individuals' control over their learning and providing greater freedom of individual choice. However notions of 'accountability', 'freedom', 'individuals', 'individual choice', 'individual learning needs', 'industry' and 'industry training needs' are all social and political constructions. They are problematical since they are grounded in particular discourses, which reflect and shape particular, contestable relations of power. They reflect different understandings of the way in which the world is and ought to be.

Within the context of Aotearoa New Zealand and the wider global political economy of the 1980s and 1990s, dominant notions of 'the individual', 'industry' and 'learning needs' were shaped by the demands of multi-national capital and post-Fordist systems of production and marketing. Notions of 'workers', 'workers' rights', 'trade unionism', 'citizenship' and 'citizens' rights' were all subordinated or entirely displaced within dominant discourses by notions of 'employees', 'customers', 'clients', 'employment contracts', etc.

New Right ideologues have abstracted notions of 'the individual' from their contexts, thus reducing and atomising human beings. They have torn 'individuals' from their real material and social networks and re-fashioned them as 'consumers', 'employees', 'investors', etc. They have obfuscated the realities faced by real people in their day-to-day existence and their hopes

for a better life by proclaiming the glories of the market-place 'freed from the distortions caused by political interference' and industrial action. They have turned discourses about the nature of human beings and their basic needs into discourses about private capital accumulation, profits, the needs of capitalist forms of industry and enterprise, the need to reduce the levels of taxation of the rich and encourage 'self-reliance' by the poor.

On the one hand, 'individuals' are treated as units of production or bundles of skills to be shaped by the ever-changing processes of production and distribution in the global capitalist economy. On the other hand, they are treated as consumers and potential consumers of the increasingly varied, specialised and sophisticated products and services that are necessary to maintain the process of capital accumulation. Hence the 'need' for individuals to constantly learn new skills throughout their lives so that they may continue to participate efficiently in a rapidly changing labour market as well as consuming the new products and services as they become available.

Notions of 'individual choice', 'individual autonomy' and 'individual freedom' underlie many elements of the framework. These notions allow us to create policies and practices which appear to reflect and engender equality of opportunity among individuals. However, to the extent that the framework is grounded in an ideology of individualism that fragments people's identity and social experience, it becomes part of the hegemonic process of assisting the maintenance of inequality without force through 'the production of regimented, isolated and self-policing subjects' (Edwards, 1991 p. 90). Moreover while the framework may provide a larger and more impressive 'pyramid of opportunity' in the educational marketplace for some individuals, Edwards points out that '... it condemns us all to structural relations of power which reproduce inequality. Individuals escape, but structures of inequality and the subordination of groups continues. Unequal opportunity is perpetuated and legitimised within an ideology of equality of opportunity' (Edwards, 1991 p. 91).

The framework is likely to play a powerful role in the allocation of labour power and more generally in the paid workplace. In the first place, within the context of an industry-led training policy, dominated by the inevitable pressures under capitalism for every enterprise to maximise its earnings in the global market, notions of skill and skill development, which underpin the qualifications framework, became almost infinitely flexible. As Nancy Jackson and Steve Jordan have pointed out, '... the notion of "skills" is being reinvented in the public imagination as a commodity in the market' (Jackson & Jordan, 2000 p. 200). Moreover, they go on to argue that the reinvention of the notion of "skills", which has taken place in parallel with the development of unit standards for each occupation, has had a significance well beyond the market-place. It has allowed for the abolition of old forms of apprenticeship, with

all their 'rigidity', 'inflexibility' and 'lack of responsiveness' to the 'requirements' of employers. These have been replaced by new forms of apprenticeship '...based on training periods of much shorter duration, leading to certifications of more limited scope, with reduced wages and autonomy in the workplace upon completion. These arrangements are much less 'responsive' than in the past to the union goal of delivering benefits to members (income, security and status) and much 'more responsive' to the business 'bottom line' (Jackson & Jordan, 2000 pp. 201-202).

The reinvention of the notion of "skills" also allowed for the re-evaluation and re-interpretation of so-called 'soft skills' or 'communication skills' in the work-place. It has been argued that: 'In its centrality to new work regimes, the concept of "skill" itself has become profoundly elastic. It is used to stand for virtually any element of work practice that the employer wants to change unilaterally' (Jackson & Jordan, 2000 p. 206). Communication among co-workers on the job has historically been highly valued by unionists, not least in providing opportunities to build worker solidarity in recognition that the interests of workers and their managers were not necessarily identical. By way of contrast, Jackson and Jordan argue, "communication skills" ... in the so-called 'new workplace' are defined specifically as those that enable team members to overcome any resistance (their own or others) and to embrace the goals, terms and conditions of work desired by the employer. The 'skills' ... come to include the 'skill' of convincing one's peers to put the interests of the employer (e.g. production targets) ahead of the individual or collective interests of the worker (e.g. improved working conditions)' (Jackson & Jordan, 2000 p. 206).

Secondly, given the kind of scenario pictured by Gorz and Castells, together with an industry-led training and qualifications framework, it is likely that only a minority within the workforce will continue to participate in the pursuit of qualifications in the hope of securing jobs in the core or periphery. The vast majority are likely to become disillusioned with a search for qualifications within a shrinking global labour-market. It is not necessarily a lack of skills or a lack of credentials that are the blocks to economic development (See for example Blaug, 1995; S. Bowles & Gintis, 1995; Martin Carnoy, 1995a, 1995b); rather it is the capitalist system itself that gives rise to booms and busts. Gorz (1989) and Hart (1992) both argue from very different perspectives that we should stop thinking and planning to meet the needs of industry for an ever more highly qualified workforce: we should instead challenge the assumptions on which current policies are based.

Conclusion

This chapter has documented some ways in which a qualifications framework may be shaped

by political and economic forces and ideologies. Context does have an impact. If we are to begin to meet the real learning needs of people more effectively, we will have to go beyond the task of helping individuals escape or climb the pyramid of opportunity; we must move beyond a welfarist and narrowly skills-based approach to education and training. We must go on to use the framework to legitimate educational and action programmes which encourage participants to question and challenge the structures of inequality and subordination, and we must work and organise politically, industrially and educationally to secure a place in the sun for those programmes which do not fit within the qualifications framework. Finally, we ourselves must continue to raise awkward political questions and organise to promote alternative democratic political and industrial discourses, and educational and action strategies which lead to the development of policies and practices that advance the collective interest and liberation of all people.

Chapter 10¹

Lifelong learning and the Third Age.

This chapter describes a wide range of developments in lifelong learning and adult education over the past three decades from a perspective which highlights the relevance of these developments for people in their middle years and older - people of the 3rd Age. In the chapter, I discuss a wide range of programmes and activities which emerged over the period, and the chapter draws attention to the rich diversity of interests and contributions of older people. On the other hand the chapter also highlights some of the difficulties faced by those engaged in supporting and facilitating these programmes, not the least of which has been the lack of leadership and support by a state, which through much of the period, placed increasing reliance on market mechanisms for the delivery of services.

Introduction

The primary purpose of this chapter is to provide some historical background on the learning and education of people in their middle years and older - people of the 3rd Age. Although chronological age may be a significant factor influencing people's lives and learning experiences and perspectives and providing a marker of common historical experiences of successive cohorts, it is not a factor which determines people's work, welfare or health status or their learning interests or capacities (Withnall, 1997). Class, gender, race, ethnicity, occupation and prior experiences of formal, non-formal and informal education are likely to exert at least as much influence on the lives and learning interests of people in their middle years and older as that of chronological age (Tobias, 1998). As was pointed out by the Social Advisory Council (I. Williams et al., 1984) 'The most significant single characteristic of older people is not their age but their diversity' (p 19).

Learning and the 3rd Age can therefore only be understood in the context of the very much wider field of lifelong learning and adult education. And this field, it may be argued, encompasses programmes and activities which have sought to contributed to the following goals:

- the preservation and enhancement of cultural traditions, the promotion of critical awareness, sensitivity and appreciation of cultural, scientific, and artistic traditions, the dissemination of information and understanding of these traditions, and the promotion of creativity and imaginative endeavours;
- the promotion of functional, cultural and critical literacies;

¹ This chapter is based on a paper prepared for the 'Meeting of the Generations' Forum held at the Millenium Hotel, Christchurch, 14-15 September 2000.

- the promotion, preservation and strengthening of traditions of democracy and active citizenship and the production of social capital and the promotion of civil society;
- the promotion of cultural, educational, economic and political mobilisation of marginalised, exploited or oppressed groups and communities, the promotion and support of community development and capacity building;
- the provision of support and assistance to adults, who for whatever reasons, were ‘cooled out’ (Clark, 1960) of formal education when they were young, to enable them to achieve their educational, cultural, occupational and social goals;
- the promotion and facilitation of lifelong learning, the promotion of economic development, the maintenance and upgrading of knowledge and skills required in the labour market, and the promotion of organisational effectiveness by providing management, employees’ and workers’ education, training and development programmes.

On this very broad canvas, this chapter paints a picture, which highlights key aspects of the field viewed from a third Age perspective.

Lifelong learning is nothing new!

The engagement by people in their middle years and older in learning and education is not an entirely new phenomenon. From times immemorial, older people have been engaged in learning and education. They have sought to continue their own learning and to support and facilitate the learning of younger people in their communities.

Evidence suggests that lifelong learning was a key feature of life in the whanau, hapu and iwi in pre-colonial Aotearoa, and since the early years of colonisation, many new forms of learning and education for older and younger adults have emerged and in some cases disappeared (Walker, 1990). In the 19th Century, these new initiatives included the establishment of organisations such as the Mechanics Institutes, Athenaeums, Mutual Improvement Societies, workers’ discussion groups, technical classes associations and public libraries (J. Dakin, 1996). These were followed in the 20th Century by such organisations and programmes as the following: the Workers’ Education Associations, the Country Women’s Institute, the Women’s Division of Federated Farmers, university extension departments, book discussion schemes, pre-retirement programmes, community centres, technical colleges, community colleges, polytechnics, trade union education programmes, adult literacy schemes, school-based community education programmes, Rural Education Activities Programmes and the New Zealand Institute of Management (Tobias, 1996).

What is new is that many more people are living active & healthy lives for so much longer!

What is new is the changing demographic picture and the vast increase in the number of people surviving into old age. We are at the present time in the midst of an historical period of colossal demographic change. In Europe until the 1800s, expectation of life at birth is estimated to have ranged from between 30 and 40 over the previous 800-1000 years. Over the past 150 years, this expectation of life at birth doubled and although it has temporarily almost plateaued, over the next 400 years or so it is expected to rise gradually to between 85 and 98. Over the same period, the proportion of the population over 60 has also risen dramatically from 10% in the 1850s to 22% in the 1990s and is expected to rise to between 32% and 36% over the next 400 years (Laslett, 1995, 1996).

In New Zealand these changes in the population are taking place somewhat more slowly than in Europe. Nevertheless, the population is ageing. Expectation of life at birth has risen from between 30 and 40 two hundred years ago to 79 for women and 73 for men in the early 1990s, by which time the proportion of the population over 60 had reached 15.5%. Today women who reach the age of 65 can expect to live to 84 whereas men who reach the age of 65 can expect to live to 80 (Else, 1999; Else & St John, 1998). With this very rapid increase in both life expectancy and in the number and proportion of older people in society it becomes increasingly important to consider the place of older people as well as their participation in and contribution to all aspects of society including education (Heppner, 1996; Williamson, 1997).

What of the recent history of lifelong learning and the 3rd Age?

Many developments in the field of adult education such as those mentioned above have not been specifically or exclusively intended for adults in the Third Age or for older adults. They have nevertheless been of considerable significance to many people in their middle and later years and this chapter focuses on changes over the past thirty years with special attention being given to programmes specifically intended for those in their middle years and older.

Policy developments in the 1970s: In some respects the 1970s may be seen as a golden age in the development of many forms of adult learning and education. In 1972 UNESCO published a very influential report entitled 'Learning to be' (Faure, 1972), and in the same year a committee of the New Zealand National Commission for UNESCO picked up and developed many of the innovative ideas that were surfacing around the world in a report on 'Lifelong Education' (Simmonds, 1972). As is implied in its title, this report argued for educational planning and practice to take into account the developmental needs of people throughout their lives. This was followed by a whole series of further conference reports (Advisory Council on

Educational Planning, 1974) as well as legislative and administrative action which provided the framework for adult entry to secondary schools and for the establishment of community schools and community learning centres based on secondary schools.

Schools-based community education: It was however particularly through the gradual expansion of schools-based community education, funded partly by grants from the state primarily through a ‘tutor-hours’ system and partly by fees charged to participants, that schools have made their biggest contribution to meeting the learning interests of adults in their middle years and older over the years. Starting with changes in the regulations governing schools-based community education in 1978, which permitted selected schools to have greater autonomy, schools have gained increasing measures of autonomy in deciding what courses to offer.

This was extended very much further with the passage of the Education Act of 1989. As we saw earlier, this Act provided for major changes in the administration of schools, with each school being governed by its own Board of Trustees under a charter negotiated with the newly created Ministry of Education. On the other hand, although schools gained greater decision-making authority and hence opportunity to respond to local adult and community education demands, the greater financial autonomy of schools put increasing pressures on principals and Boards of Trustees to view their community education programme primarily as a potential source of additional revenue for the school as a whole, rather than as a programme with its own intrinsic value and identity, or as the school’s contribution to the kinds of goals referred to earlier. The 1990s did see a strengthening of the identity of the community education section at many schools. Advisory groups were established. Moreover, there was a steady increase in professionalisation of the community education coordinator’s role at many schools, and this led in 1998, to the formation of the Community Learning Association through Schools (CLASS), an independent professional association of school-based community education co-ordinators. On the other hand, the disestablishment of the Department of Education, and its replacement by the Ministry of Education was accompanied by a reduction in the kind of professional support that had been provided in the 1970s and 1980s by the department through the services of its advisor, Charlie Herbert (C. M. Herbert, 1984, 1996).

Polytechnics: The newly emerging framework also allowed for the opening up of technical institutes and community colleges to a much wider range of community programmes for younger and older adults (Fargher, Zepke, & Webber, 1985; Garrett & Paterson, 1984). One example of the way in which staff at the Christchurch Polytechnic responded to the challenge of the 1970s to broaden its role was by initiating from the mid-1970s a programme called ‘New Outlook’ intended to support and help women who were considering returning to the

paid workforce in mid-career. So successful was this programme that it has continued to be offered over the years with a steady broadening of its scope to address other development needs of women of all ages. This eventually led in the late-1980s to the establishment of the Next Step Centre, which has provided a wider range of programmes for younger and older women.

At the national level, the large-scale re-organisation of school administration in 1989 was followed in 1990 by the equally large-scale re-structuring of post-compulsory education in terms of the Education Amendment Act of that year. Among other things this Act provided for the abolition of the University Grants Committee, the establishment of a common system of management, administration and funding of all tertiary institutions on the basis of charters, using an EFTS formula, and the establishment of mechanisms for the registration and accreditation of private training establishments. This act therefore accorded very much greater autonomy to polytechnics and colleges than they had had previously. These changes were designed to allow for greater flexibility of curriculum and programme development at the local and regional level, and it might be anticipated that this flexibility would allow polytechnics to respond more effectively to the needs of different 'communities' including the various 'communities' of older people in their areas. This may have happened in some instances. However financial as well as status and other pressures have tended to encourage polytechnics to move to offer more degree-level and other mainstream programmes at the expense of some of the more risky and innovative programmes that might have attracted older people (See Zepke, 1996).

Universities: Historically provision for the admission of adults including older adults who did not meet the formal entry requirements to study at universities was more liberal and open in New Zealand than at universities in most if not all other countries. In addition, the establishment of Massey University's extra-mural programme in the 1960s with its distance education programmes increased the accessibility of university courses. Since that time, however, university programmes have greatly expanded and in some cases, they have sought to include a larger number of 3rd Age adults. In the 1970s the University of Canterbury established a Certificate in Liberal Studies with no formal entry requirements which for twenty years provided a range of liberal arts and sciences courses expressly designed to appeal to people in their middle years and older. It was a part-time programme, consisting of four courses chosen from a wide range of subjects, successful completion of which was recognised as partial completion of a degree. Also, in the 1970s the University of Auckland established the first New Start programme designed to provide adults who might be interested in undertaking university studies with encouragement and support and an opportunity to develop study-skills. These New Start programmes were extended to other universities and the first

programme at the University of Canterbury was offered in 1981. These programmes have continued to be offered and many thousands of adults of all ages throughout the country have participated in them.

Over the years a gradually increasing number of people in their middle years and older have undertaken degree studies at universities as some of them have offered an increasingly diverse and flexible curriculum, and Judith Davey (2001) is currently undertaking an in-depth study of people 40 and over who are studying at Victoria University. Since the late-1980s, some universities have focused particular attention on efforts to provide courses for specific segments of the population. For example, Lincoln University has provided re-training programmes for those made redundant in their middle years, while other universities such as Auckland have established M.Phil. degrees, and actively recruited retired people to return to study to pursue special interests through this degree framework (Tarling, 1987).

Not all older people interested in attending university wish to do so for degree or diploma purposes. Indeed, it is probable that most older people interested in the kinds of knowledge offered in universities do not wish to study for credentials. For this reason many of these people have participated in programmes offered by the universities through their centres of continuing education. The 1980s and 1990s have seen a continuation of traditions of providing liberal adult education programmes for individual development and continuing professional education programmes. However there have been a number of changes in these areas, and some new programme areas have been established, whilst others that were small or marginal ten years ago have grown in size and significance.

Overall, the period is one that has provoked diversification. Universities have responded in various ways to the range of pressures and in particular increased financial pressures. One response was to close down centres and withdraw from the general field of adult and community education. In 1995, University Extension at the University of Otago was closed down completely. A more common response was to require centres for continuing education to recover a greater proportion of their costs. At some universities, the range and depth of liberal adult education programmes have been reduced as a consequence of wider changes. The number of certificate and diploma courses has grown at some universities, while at others these courses have been cut back. At other universities, including the University of Canterbury, there has been a growth in the number of short 'general studies' courses, summer schools and other programmes catering to a very wide range of personal, professional and academic interests. In these instances, in spite of fee increases, the number of participants in their middle years and older is likely to have grown considerably.

Colleges of Education: Historically teacher training at colleges of education was largely if not entirely restricted to young adults. Those accepted for teacher training were generally in their mid- and late-teens, coming straight from school. Gradually and in particular from the 1970s this began to change, with a small proportion of people in their 30s and early 40s being accepted for training. It was however not until the mid-1980s that the age-barriers to entry were formally abolished enabling those 45 and over to undertake teacher training, and of course from 1993, when the Human Rights Act became law, all forms of age discrimination in employment, education and training became illegal.

WEA: In 1973 the Canterbury WEA established an experimental 'Wider Horizons' programme for older people under the title 'Knowledge in Retirement'. This programme of daytime classes, initially intended for the 'over 60s', attracted 63 members with 130 enrolments for a total of 11 classes in the first two terms of the first year, and 216 members with 500 enrolments for a total of 19 classes in the first two terms of the second year (Roth, 1974: 112-113). In accordance with WEA traditions, members themselves played an active role in planning the programme through their elected committee. In view of the considerable success of the venture, it was decided in 1974 to open the programme to all adults. This was done in the light of professional opinion at the time, which pointed especially to the way in which the programme might meet the needs of women not in the paid workforce, in addition to those of older people (G. E. Roth, 1974; George E. Roth, 1977). That policy has been maintained over the years, and although the WEA daytime programme has continued to attract large numbers of 'over 60s', it has also continued to attract many women and men in their middle years.

In 1995, the daytime programme consisting of 49 classes attracted 916 enrolments and in 1999, 25 classes attracted 608 enrolments (WEA Reports). It is not easy to judge whether or not the policy of opening up the daytime programme in the 1970s was a wise one. The reasons referred to by George Roth at the time remain valid to day. These included the desirability of maintaining a mix of ages and attempting to cater for those from younger age-groups who 'are also starved for semi-formal, non-vocational non-institutionalised daytime sources of knowledge and mental stimulation' (Roth, 1974: 116). Moreover, the financial viability of the WEA over the years has hinged on its ability to attract as many participants as possible to all of its programmes. This arose out of the fact that the WEA's somewhat limited grants from the state were withdrawn in 1983, partially restored in the later 1980s and then withdrawn again in the early 1990s. On the other hand the decision to open the programme to all age groups undoubtedly had the effect of reducing the sense of 'ownership' of the programme which had existed in the early years and the open policy did not fit well with neo-liberal ideologies of state funding which looked to the voluntary sector to contract with the state to provide

specified services to target groups in the community.

Social and political issues, employment and unemployment: The 1980s and early 1990s was a period of considerable economic, social and political upheaval. They were years characterised by low levels of capital accumulation and high levels of unemployment and underemployment. They were also years during which successive governments instituted a wide range of policies under the influence of neo-liberal ideologies which were designed among other things to expose New Zealand institutions, both private and public, more fully to the forces of multinational capitalism, and hence reduce the level of provision of services by the state and introduce 'user pays' policies for many of those services which continued to be provided or supported by the state. The high levels of unemployment and underemployment had very widespread effects. However younger and older workers were probably the worst affected with many young people struggling to enter the labour market and many older people struggling to re-enter it following massive redundancies and lay-offs especially consequent upon large-scale state sector re-structuring. In the light of this several training and re-training programmes were set up by the state, with ACCESS being launched in 1987 and Training Opportunities Programme (TOP) in 1992. Although some older people participated in these programmes, they were primarily intended for young adults.

As we have already seen, a large number of voluntary organisations and community groups responded to many of the policy changes during the period and focused on raising public awareness of the issues (Tobias, 2000a). Many older people became deeply involved in these organisations and groups, and contributed to and participated in the rise of movement-based education/action programmes. In response to public sector restructuring and the consequent large-scale redundancies of older workers, in 1989 the Mature Employment Service (MES) was established. This voluntary self-help organisation has over the years attempted to highlight issues of age discrimination in the workplace and has argued that forced retirement is one such form of discrimination. Over the past ten years, it has worked alongside such organisations as Age Concern to find solutions to problems identified by older workers themselves (Patterson, 1999).

Special programmes for older learners: The 1980s saw a very large number of policy and programme initiatives specifically addressing the position and learning needs of older people. In 1982, the United Nations World Assembly on Ageing provided the first significant international forum to examine the implications of the 'greying of the nations'. Two years later in 1984 Age Concern published a discussion paper in which drew attention to a wide range of overseas programmes of learning for older people and outlined a set of proposals for the development of lifelong learning opportunities in New Zealand (Mackie, 1984). In the same

year the New Zealand Social Advisory Council under the chairmanship of the Hon Les Gandar published its report (I. Williams et al., 1984). Among its many suggestions was a recommendation that the then National Council of Adult Education should 'encourage informed public discussion on attitudes to later life, taking the initiative to promote this concern through existing networks'. This recommendation and others focused on the importance of providing learning opportunities for older people was supported by Age Concern, and in August 1984 the National Council of Adult Education set up a Working Party on Ageing and Education. Its aims were: to promote appropriate learning opportunities for older people and appropriate training for relevant professionals, volunteers and relatives of older people, to promote positive views of ageing and challenge negative stereotypes. This group chaired by David Battersby and Louis Croot remained in existence for three years until 1987 and promoted a wide range of activities including television and radio programmes and regional seminars to achieve its objectives (Ageing and Education Working Party, 1987).

For many years, educational programmes on planning for retirement have been offered by insurance and investment companies and consultants looking to sell their insurance policies or investment portfolios. In addition schools, polytechnics, WEAs etc have offered occasional courses. From time to time, however concerns have arisen about the extent and nature of the provision. A number of people and organisations that made submissions to the Social Advisory Council's Working Party in 1984 emphasised the need for more comprehensive provision of pre-retirement programmes. One respondent proposed the establishment of national and local retirement councils (Williams and others, 1984: 67). The Working Party took a view which stressed the fact that preparation for life after retirement should be seen as part of a continuum of training to be offered to employees throughout their working lives. It was suggested therefore that employers including the State Services Commission should take responsibility for planning these programmes of training. In response to these kinds of concerns, in the late-1980s Victor Hindmarsh set up a limited liability company called Retirement Advisory Services (RAS) with its headquarters in Auckland. The aim of RAS was 'to encourage people to plan positively to utilise unstructured time and financial resources in a manner which is rewarding to them (Heppner, 1992). This company, subsequently renamed Retirement Planning Services (NZ) Ltd, continues to offer retirement planning seminars around the country. In the year 2000, fifty-eight seminars were offered, and the fee was \$463.50 per person with the retiree's partner being encouraged to attend at no extra charge. These seminars provide an excellent service for employees of organisations willing to pay the fees and provide the time-off work. Unfortunately, the relatively high fees are a very effective barrier to attendance by the increasing number of workers who are in part-time, casual or flexible employment as well as most of those who are self-employed.

At the local level, a number of new programmes were launched over the period. In January 1983, the University of Otago offered its first summer school for over 60s (O'Rourke, 1984). In 1986 in Christchurch a group of people, drawn from a wide range of educational institutions, agencies and voluntary organisations working with older people and supported by the Community Services Division of the City Council, met for several months to consider a wide range of issues in relation to learning and older people. This eventually resulted among other things in the production of a series of leaflets designed to inform older people of existing learning, leisure and recreational opportunities. In Christchurch, as Patterson has pointed out (1999), the City Council maintained its interest in the 1990s and in recent times has worked with the Canterbury Development Corporation in assisting in the development of the Christchurch Third Age Programme.

In 1986 in Dunedin, a new organisation called SPAN was set up. The aim of SPAN was to contribute to the task of bridging the generation gap by making more effective use of the skills and knowledge of older people in the community and in particular by establishing links between them and school children (Somerville, 1987). In 1987 in Christchurch, the Canterbury WEA set up a group to explore the possibility of establishing one or more locality-based programs. A series of meetings was held in various parts of the city together with a seminar at the WEA, which was addressed by Rosalie Somerville. Also, in 1987 Hagley Community College was active in piloting a telephone linkup to serve the learning interests of those older and younger people who could not readily get to classes.

The 1980s and 1990s saw the growth of educational travel programmes for older people both internationally and in New Zealand (Russell, 1993). In 1975 in the U.S.A. Elderhostel was launched as a non-profit company with the aim of providing educational travel programmes for older people from North America both within North America and internationally. Over the following years its growth throughout the world was very rapid, and in 1987 the New Zealand College for Seniors, a consortium of tertiary institutions promoting educational travel among older people, was established to provide a New Zealand-wide base for planning and negotiating educational travel programmes for groups of Elderhostel visitors to New Zealand from the U.S.A. and also to promote educational travel programmes by older New Zealanders. Throughout the 1990s, the New Zealand College for Seniors continued to organise programmes in New Zealand for North Americans. In the mid-1990s, it faced tensions as a consequence of which many of the original sponsoring institutions withdrew from the organisation. The College for Seniors never played a very large role in providing educational travel programmes for New Zealanders. This has been done by a variety of organisations and institutions including the Universities of Canterbury and Waikato acting on their own or in collaboration with other institutions both in New Zealand or elsewhere. Although these

programmes have seldom been limited in any way to older people, many of the participants have in fact been drawn from among older age-groups.

The establishment and growth of the U3A movement has been a feature of life in many communities throughout New Zealand since the early 1990s. Although it is possible that U3A groups may have been set up in other centres somewhat earlier, it would seem that the first U3A study groups were set up in Auckland in 1989 (Heppner, 1994a, 1994b), and in Christchurch in the early 1990s on the initiative of the University of Canterbury (Swindell, 1999). These groups, which are all completely autonomous and self-funding, have varied widely in their organisation and philosophies. Some are quite formal while others are extremely informal. Some have focused on research, study and discussion; others have organised regular series of lectures by visiting authorities; and still others have drawn primarily on members themselves to give talks and lectures.

The 1990s also saw the establishment and growth of SeniorNet throughout New Zealand. SeniorNet is a community-based organisation, which emerged in 1986 out of a research project in San Francisco in the U.S.A. The aim of the project was to determine whether computers and telecommunications could be used to enhance the lives of older adults. SeniorNet is a 'non-profit community-based organisation which aims to give people over the age of 55 access to computers and training, so that they can become confident and competent at using computers and, hopefully, pass their skills on to other over-55s. As part of SeniorNet's philosophy of peer-training, members are taught by other computer-literate members in courses that range from word-processing to desk-top publishing' (SeniorNet Canterbury, 1996). There seems to be some dispute about the origins of SeniorNet in New Zealand. SeniorNet Canterbury claims that the first centre was established in Wellington in 1992, with support from Telecom New Zealand. Moreover, it is claimed that this was not only the first centre in New Zealand but also the first to be set up outside North America. On the other hand, Peter Clarke, computer tutor at Pakuranga College and previous chair of SeniorNet, Pakuranga claims that a small SeniorNet Learning Group was commenced at that college in 1986 (Clarke, 1998). Over the following few years, SeniorNet centres were established in all major centres in Aotearoa with the Christchurch centre being set up as an incorporated society early in 1996, and by 1998 it seems that there were 23 such learning centres scattered throughout New Zealand.

What are the participation trends and learning interests of people in the 3rd Age?

Finally, in the light of all the developments described above has there been any increase in the proportion of people in the 3rd Age participating in educational programmes and activities?

And what are their learning interests? And how are we to ensure that they are being met? Very little research has been done to enable us to answer these questions satisfactorily. Elsewhere (Tobias, 2001) I have reviewed the quantitative data on participation trends derived from a number of national sample surveys carried out over the period. This analysis suggests that while there has been some increase in participation rates among those in their forties and fifties there may also have been a decrease in participation rates among those in their sixties.

On the question of the learning interests of people in the 3rd Age, in 1991 I reported the findings of a national sample survey undertaken twelve years previously which shed some light on this. This study (Tobias, 1991b, 1991c) suggested that there was a considerable potential demand for education among older people. Not surprisingly those in their 50s continued to be involved and interested in vocational and work-related education at about the same level as younger adults, while vocational interests tailed off among those who were 60 and over.

The greatest interest among adults of all ages was expressed in the arts and crafts, and these learning interests tended to be even more common among older than among younger people. Areas of learning interest mentioned included the following: sewing, crocheting, knitting, cooking, pottery, bookbinding, candle making, cane work, carving, ceramics, floral art, jewellery making, leather work, linocuts, woodcuts, model and miniature making, picture framing, shell work, wood turning, basketry, furniture restoring, boat building, electronics, ham and amateur radio, metalwork, woodwork, cabinet making, optics, telescoping, restoring and maintaining engines and cars, embroidery, macramé, rug making, soft-toy making, spinning, tapestry, weaving, painting, sketching and printmaking, singing and music making, and creative writing. In addition there was a continuing interest in general educational studies especially in the humanities and social sciences.

Reasons given for wanting to undertake a new learning programme included: spending their spare time more enjoyably; improving their general education; making some contribution to the community; improving some aspect of their family lives; learning more about their special interests; giving them an interest outside their home or job; meeting others with similar interests; and preparing for a new job or helping them in present job. Reasons that were given highest priority more commonly by older than by younger adults were those which involved people:

wanting to spend their spare time more enjoyably or developing an interest outside the job or home;

concerned with pursuing a special interest; and

wanting to increase their capacity to make a greater contribution to the community.

These findings, derived from quantitative survey data, reinforce the view expressed earlier in this chapter which emphasises the very wide diversity of interests among older people as well as the very wide diversity and richness of their contributions and potential contributions. Further support for this view is contained in qualitative studies currently being undertaken to explore the formal, non-formal and informal learning experiences and perspectives of people who have had little or no experience of formal post-compulsory education (Tobias, 1998).

Conclusion

In this chapter, I have pointed to some of the policies, policy proposals, activities and programmes which have emerged over the past thirty years or so. I make no claim to comprehensiveness. Indeed I am very conscious of the many gaps in this chapter and am particularly aware that I have focused on Christchurch and that very much more work is needed to tell the stories of other cities and regions. For this reason it is necessary to be more cautious than ever in drawing conclusions. Nevertheless, it is possible to draw some tentative conclusions.

It is clear that there has been considerable overall growth in the number and range of programmes for those in their middle years and older. More older people are undoubtedly continuing their education in a number of ways through a variety of programmes. The importance of lifelong learning and the need to ensure that all older people have opportunities to learn on equal terms and in appropriate ways and that their skills, knowledge and abilities should be used and valued has been widely recognised both locally and internationally (Findsen, 1998; and UNESCO, 1997).

At the same time it seems likely that the divide between the more privileged who are able to gain access to learning opportunities and who are in the position to make a significant contribution and those who have few resources and little opportunity to contribute may well have grown considerably especially over the past fifteen years (United Nations Development Programme (UNDP), 1990-2002, 2001). In New Zealand and in some other countries the implementation of neo-liberal policies by the state has undoubtedly had a significant effect. There has been a striking absence of leadership by successive governments in the development of policy since the late-1980s, as increased reliance by the state on market mechanisms for the delivery of services has seen a neglect of coordination, and the withdrawal of funds from voluntary organisations and community groups which have attempted to develop their own programmes and gain a sense of ownership of these programmes. Many of the most

innovative of the programmes described above have been starved of financial backing and of important forms of recognition, which might have been provided by governments less committed to an agenda of privatisation.

Overall, it seems to me that future policies should be directed in particular not only at encouraging innovation but also at the task of sustaining voluntary organisations and community groups to enable them to devote their energies to the tasks of offering programmes rather than merely surviving. They should also be directed at providing adequate support for those educational institutions and agencies which demonstrate a genuine commitment to the tasks indicated above.

Chapter 11

Lifelong learning and the universities in New Zealand

Introduction

This chapter reviews some aspects of the history of universities in New Zealand, with particular reference to their contributions to lifelong learning and adult education. It notes some of the conservative influences and the ways in which universities have functioned to reproduce power relations rather than to challenge them, but also notes other significant geographical, social, cultural and political influences shaping the universities over the years, and argues that some of these have resisted the hegemonic forces and some have led to adaptations and modifications of the imported model of the university as well as the emergence of critical tensions. Special attention is given to the Hughes Parry report of 1959 and the reforms of the late-1980s and their effects on the universities within the context of lifelong learning.

Background

Throughout much of their history, universities in New Zealand have been heavily influenced by their counterparts in the U.K.. These influences, largely though not entirely of a conservative nature (Jesson, 1997), together with many deeply conservative local influences, both in the universities and outside them, have seen New Zealand universities, like universities in other countries, function in many respects as institutions for the reproduction of the relations of class, gender and race (See for example Campbell, 1941 pp. 167-171). Maori cultural traditions have struggled over the years to find a legitimate place in the university curriculum. Indeed as Linda Smith has pointed out,

‘Although New Zealand universities see themselves as being part of an international community and inheritors of a legacy of Western knowledge, they are also part of the historical processes of colonisation ... Universities were established as an essential part of the colonising process. Colonisation interrupted the historical continuity of the indigenous people’ (Smith, 1997 pp. 186-187).

These processes of colonisation and appropriation have strongly affected participation and achievement by Maori in the universities. With regard to gender, it is only in the last decade or so that similar numbers of women and men have been enrolling at universities in New Zealand. Drawing on 1987 data from the Department of Statistics, I have calculated that only a little over one-third of those with bachelors degrees at that time were women, and hence that twice as many men had graduated with a bachelors degree (Tobias, 1990b). With regard to class, Hughes and Lauder are among several researchers who have provided extensive evidence of some of the ways class affects decisions or non-decisions on whether or not to

enrol at a university (Hughes & Lauder, 1991; Lauder et al., 1985).

In spite of these conservative influences and the ways in which universities have functioned to reproduce power relations rather than to challenge them, there have also been other significant geographical, social, cultural and political influences shaping the universities over the years. Some of these have resisted the hegemonic forces and some have led to adaptations and modifications of the imported model of the university as well as the emergence of critical tensions (See for example the episodes mentioned in Gibbons, 1992). Many of these adaptations and modifications have been congruent with the principles associated with those who promote discourses of lifelong learning.

Over the years many initiatives have been taken to link the universities with the concerns and aspirations of working people. These can be traced back to a range of nineteenth century activities including the formation of the Technical Classes Associations in the 1880s with the active support and involvement of university people such as Thomas Bickerton. It was however only with the formation of the WEA, also imported from the UK in 1915 that the University of New Zealand along with its constituent colleges became involved in providing education for working people on a regular and organised basis. These WEA classes which were open to all and which did not involve examinations, were not intended to be taken for degree or diploma purposes. They were initially intended to provide 'non-vocational' higher education for working people. However because in most small communities there were so few educational opportunities for those who wished to pursue their cultural and social interests, the WEAs over time and in some communities became the main providers of general adult education. Nevertheless the organisational links with the universities were retained for many years and many members of staff of the universities have continued to play important leadership and teaching roles in the WEAs.

Part-time study and open entry policies for adults

Parallel with this adult education provision, there has also been a long tradition of part-time university study and relatively open non-competitive entry for adults to general arts, commerce and science degree programmes. Moreover the colleges and subsequently the universities have tended to be regional in their focus drawing many of their students from their own regions and serving their regional constituencies in ways which seemed to fit with the requirements of a small-scale society but which were far removed from the traditional Ivory Tower traditions which tended to predominate in much of Europe and the UK. In spite of recommendations by a number of commissions dating back to the nineteenth century emphasising the importance of full-time and preferably residential study and suggesting that

no university could remain true to itself unless it could claim that most of its students were engaged in full-time studies, a sizable proportion of the student body has for many years been studying part-time. Moreover, unlike the position in some other countries where two separate and unequal forms of degrees for full-time and part-time study have had the effect of discounting the value of part-time study, in New Zealand no such distinctions have ever been made.

A. E. Campbell (1941 p. 154) notes that in 1939 roughly half the students were part-time and about a tenth extramural, while the great majority of full-time students were attending professional and science courses. Twenty years later in 1959 46% of students were part-time. Over that period, although the overall number of students had increased considerably to a total of 13,335, the proportion of those studying part-time had changed very little (Hughes Parry, 1959 p. 37). Table 1 below provides information on the number and percentage of part-time and full-time students for selected years between 1959 and 1999. These figures illustrate the fact that in New Zealand it has historically been very common to study part-time and to combine university study with work. This is by way of marked contrast with traditions in many European countries and in the UK where part-time study was historically the exception rather than the rule. The figures in the Table also illustrate the patterns of growth over the period.. Between 1959 and 1992 there was a steady increase in the number of both part-time and full-time students with the most rapid growth in overall student numbers and especially in the number of full-time students taking place in the late-1980s and early-1990s. This growth in the number of full-time students continued in the 1990s. However the number of part-time students fell away very slightly between 1992 and 1999.

Table 1

Number & Percentage of Part-time and Full-time Students for

Selected Years between 1959 & 1999

<u>Year</u>	<u>Number of Part-time Students</u>	<u>% of Part-time Students</u>	<u>Number of Full-time Students</u>	<u>% of Full-time Students</u>
1959	6,180	46%	7,155	54%
1980	22,000	42%	32,100	58%
1985	24,683	42%	34,440	58%
1992	34,437	37%	58,745	63%
1999	33,831	32%	72,165	68%

(Sources: Hughes Parry, 1959 p. 37; New Zealand Vice-Chancellors' Committee, 2000; OECD, 1983 p. 63; Pool, 1987).

The tradition of adult entry and participation in university study is not as long-standing. Although the 'provisional matriculation' regulations, which provided for the admission of those 21 and over, had allowed for occasional 'mature students' to be admitted for many years, the enrolment of significant numbers probably occurred for the first time with the admission of returned servicemen after the Second World War. Thereafter, though the establishment of the extramural service at Massey University in 1960 provided many new study opportunities for adults, it was not until the changes in public policy discourse in the 1970s that there was any substantial increase in the number of internal adult students. Table 2 provides a picture of this growth between 1985 and 1999. Even in 1985 the proportion of all students who were 25 and over was already significant. Over the following six years there was a remarkable increase in the number of students 25 and over, with the number of those 40 and over almost doubling between 1985 and 1992. By 1999 43% of all university students were 25 and over - a remarkable change in the composition of the student body.

Table 2

Number & percentage of students in the age categories 25-39 and 40 & over studying at university in selected years between 1985 & 1999

<u>Year</u>	<u>Number of Students</u> <u>25-39</u>	<u>% of Students</u> <u>25-39</u>	<u>Number of students</u> <u>40 & over</u>	<u>% of Students</u> <u>40 & over</u>
1985	16,431	28%	5,153	9%
1992	24,935	27%	11,026	12%
1996	29,448	28%	13,258	13%
1999	29,297	29%	14,405	14%

(Sources: New Zealand Vice-Chancellors' Committee, 2000; Sources: Pool, 1987).

The Hughes Parry Report and its influence

In 1959 the Minister of Education in the third Labour government established a Committee to review the role of universities in New Zealand. The report of this Committee (Hughes Parry, 1959) marked a watershed in the development of universities in New Zealand. It suggested that the universities and colleges were 'facing a crisis of the first magnitude', and that this crisis had major implications for the future of the country as a whole. It developed the following arguments: firstly, if New Zealand was to develop its agricultural and industrial base

it would have to provide the higher education required by its future scientists, engineers, technologists, economists and managers (p. 7). Secondly, if New Zealand was to continue to provide 'health, welfare, and public educational services of a high order' (p.7) practitioners and professionals in these fields would require a high level of education and training. Thirdly, if there was to be 'growth in national self-understanding' and in the capacity to solve our own problems 'more attention should be paid ... to New Zealand's own history, life and literature, the arts .. economic problems, social problems, marine environment, soil science, and forest problems' (p. 8).

Many elements of the Committee's Report contributed to progressive discourses about the future of universities in New Zealand. The arguments it advanced for university expansion, for the allocation of more resources to universities, for research and for more generous provision for student bursaries and scholarships were significant, as was its attempt to balance the need for university autonomy with a rejection of conservative Ivory Tower notions of the role of universities. It was a strong advocate of both academic freedom and the importance of establishing links between universities and their various communities.

The Committee was critical of the contribution then being made by the universities to the education of adults in their regions. It argued that the university should be seen not only as a 'centre of original research and speculative thought, [serving] the community by supplying the educated and professionally trained graduates society requires', but also as having 'the responsibility to channel the fruits of its investigation and thought, and the thought and research of others, to the informed public at large ... [as well as providing] opportunities for the periodic refreshment and "up grading" of those who want to keep abreast of scientific and social change in their fields of special interest (p. 10-11). 'University extension work' or continuing education, it argued, was of 'special significance in a rapidly developing society which must keep itself abreast of change if it is to have the qualified personnel it requires to direct its development' (p. 11).

In the light of this, the 1960s, 1970s and 1980s saw most of the universities redefining their extension or continuing education roles and moving to involve more university staff in their programmes as well as shifting resources into continuing professional education and to a lesser extent 'role-related education'(B. M. Williams, 1978). Examples here include the courses developed in co-operation with the Playcentre movement, the Family Courts, social work programmes, health-related and environment-related courses, engineering programmes, business-related programmes and programmes for teachers. The reshaped extension departments and continuing education centres continued to be funded out of the block grants negotiated by the UGC with government on a quinquennial basis and responded in diverse

ways to the needs in their regions. In general however the emphasis was placed on developing closer relationships between extension departments and internal teaching departments and Faculties.

Many of the themes contained in contemporary discourses about lifelong learning can be found in the Hughes Parry report. On one important matter however it adopted a conservative - and ultimately elitist - position. The Committee was highly critical of the New Zealand university system for not giving sufficient attention to the provision of full-time study opportunities; it criticised the system strongly for its flexible time-tables which encouraged students to study part-time. The Committee favoured 'total immersion' in undergraduate studies for academically qualified school-leavers and saw a move away from part-time studies as being a key ingredient in the process of increasing efficiency, reducing the high failure rates, raising university standards and developing research-based universities. In this respect the Committee was of course merely drawing on the dominant discourses of the time. It was not until the emergence of lifelong learning and education discourses in the 1970s that new perspectives on part-time study and the desirability of linking work and learning began to predominate in many OECD countries including New Zealand (OECD, 1983 p. 63), and it was not until 1990 that the absolute right of those 21 and over to enrol at university without provisional admission requirements was enshrined in legislation in New Zealand.

In spite of these recommendations, which had the effect of discouraging the provision of part-time study and increasing the number and proportion of full-time students, other recommendations may well have had the effect of promoting lifelong learning provision. The growth of the independent universities which were established in the 1960s gave rise gradually to regional differentiation and a wide range of new courses designed to meet the demands of new constituencies. From the early 1960s there was considerable expansion in the range of formal professional courses offered by universities, while the number of adults undertaking professional diploma and postgraduate courses in such fields as education, nursing and management increased considerably.

In the 1970s and 1980s certificate and undergraduate and postgraduate diploma programmes of various kinds were developed at several universities. Many of these were designed as post-experience courses for adults. Some were work-related: at the University of Canterbury, for example, in response to pleas from a number of social work agencies a two-year part-time one-day a week course leading to a Certificate of Social Work was established primarily to serve as an in-service training programme for social workers. Others, however, such as the Certificate in Maori Studies at the University of Waikato and the Certificate in Liberal Studies at the University of Canterbury, were more general in their orientation. In addition during

these years several universities became involved in offering preparatory programmes. Some of these were designed to bridge the gap between school and university study, while others such as the New Start programmes were designed to provide adults who might be interested in undertaking university studies with encouragement and support and an opportunity to develop study-skills.

The reforms of the 1980s and 1990s and their effects

The reforms of the late-1980s and early-1990s, discussed earlier in this book, ushered in a new era of expansion and competition in the tertiary sector as a whole and among universities in particular. At the same time that government was increasingly devolving financial responsibilities to institutions, it was also reducing the level of state funding on a per student basis (Stephens, 1997). Furthermore, throughout the 1990s the government was looking for ways of instituting new charges on the capital assets of universities, and in accordance with neoliberal ideology it was also looking to replace collegial forms of governance with new forms of managerialism (see Tobias, 1997a). As was noted earlier, the UGC, which since its establishment in the early 1960s had acted as an intermediary between the state and the universities, was abolished and an 'across the board' system of funding of all tertiary institutions was introduced to replace the previous system of negotiated formula-based quinquennial block grants. The responsibility for setting student fees for university study which had rested with government, in 1992 was transferred to the various institutions. In the new environment an increasing number of degree programmes were established by polytechnics and other colleges, and from the late-1990s the EFTS-based system of funding was also extended to cover private education and training establishments. Universities found themselves increasingly in competition, not only with one another, but also, and perhaps even more significantly, with every other tertiary institutions (See Olssen & Matthews, 1997).

The universities responded in a number of very different ways to the range of pressures, and in particular increasing financial pressures and increasing competition, and nowhere was this more apparent than in the diversity of their responses in the field of adult and community education (see Findsen, 1996; Findsen & Harré Hindmarsh, 1996; Tobias, 1997b). One response was to close down centres for continuing education or their equivalents and to withdraw from the general field of adult and community education or to transfer the functions to the faculties, schools or divisions. This had occurred at Massey University very much earlier in the late-1970s, and in 1995 University Extension at the University of Otago was also closed down. A more common response by university administrations was to look to centres for continuing education to do two things. In the first place they were required to justify their programmes more clearly in the light of the universities' own academic objectives rather than

in terms of the interests of wider communities. Secondly they were required to be more entrepreneurial - to look for new business and new sources of revenue for the universities. These two kinds of objectives were driven by underlying pressures on centres for continuing education to recover an ever greater proportion of their costs or to recover all their costs and generate surpluses for the wider university. These financial pressures, however, were somewhat mitigated by the fact that government subsidies for both credit and credit-free programmes continued to be available through the system of EFTS-based funding. Through this the state continued to provide a substantial (though diminishing) proportion of course costs for all New Zealand residents who were enrolled at any tertiary institution.

In spite of these mitigating circumstances, the pressures on the centres for continuing education or their equivalents were considerable: these led to fee increases in many areas and a shift of staffing resources out of those programme areas which generated low levels of income or which were labour intensive into other areas where higher fees could be charged or which generated high levels of EFTS or other funding. This favoured the development of professional development and in-house programmes for those groups and organisations which could themselves afford to pay high fees or whose employers could do so, or for those organisations which could negotiate special contracts for educational and training services with the universities. Regional programmes, with their relatively high travel costs and small enrolments, suffered, and fees for general liberal adult education programmes were raised steadily. At some universities the range and depth of liberal adult education programmes were also reduced as a consequence of the pressures. The number and range of certificate and diploma courses grew at some universities, while at others there were cut backs in these courses. The funding framework favoured the provision of those general personal development programmes likely to appeal to people with relatively high discretionary incomes. One of the largest growth areas in university adult education was in the field of educational travel. This included the provision of educational travel programmes for groups of New Zealanders both within New Zealand and overseas, as well as for groups of visitors to New Zealand from other countries. The organisation of academic and professional conferences constituted another growth area at some universities.

On the other hand, in spite of the increasingly competitive environment and the increasing moves to instrumentalism, managerialism and entrepreneurialism there were also some counter-trends in the 1990s. As we have seen, the new open entry legislation, combined with the introduction of a wider range of support programmes, encouraged many people who might not have undertaken university studies to do so; some university staff and students continued to resist the dominant pressures in various ways, and some universities continued to offer a variety of relatively low cost nonformal adult education programmes drawing on the EFTS

funding available for community education as well as offering other formal programmes. At some universities there was a growth in the number of summer schools catering to a very wide range of personal, professional and academic interests with an increasing move to offer credit summer school programmes. At some universities New Start and other access programmes expanded and diversified to cater particularly for people from groups traditionally under-represented within the universities. These included Maori people, women, people from the Pacific Islands, people from working class backgrounds, and people with disabilities. Education and training programmes for adult and community educators also grew at some universities along with provision for undergraduate and postgraduate study and research in adult learning and education while at other universities these programme were closed down.

Policy development in 2000 and 2001

As discussed earlier in this book, the change of government late in 1999 led to the re-emergence of more progressive lifelong learning discourses in TEAC's first and second reports. These reports, however were general and were intended only as a beginning: they did not provide the robust and fully developed argument required counter many years of neoliberal influence and to promote the kind of lifelong learning discourses required to legitimate a broadened and deepened interpretation of the role of universities and adult education in society. It may be argued therefore that the third and fourth reports by TEAC constituted a retreat rather than a consolidation of the limited advances made in the previous reports. These latter reports, then, contained a very much weaker critique of neoliberalism and consequently a more limited interpretation of the public interest role of universities in lifelong learning.

It seems that the adoption of several TEAC recommendations are likely to have the unintended consequence of further fragmenting the tertiary sector and reinforcing existing hierarchies of tertiary institutions (Tobias & Pearman, 2002). This would be contrary to the TEAC's own stated intentions. The proposal to separate the funding of teaching and research (Tertiary Education Advisory Commission, 2001a p. 111) is one such recommendation which may well contribute to this, since it is likely to result in increasing competition for places at elite research institutions, together with increasing pressures on university administrations to withdraw the best researchers from teaching in undergraduate programmes and to offer fewer bridging and support programmes. This may well have the effect of making universities more exclusive rather than inclusive and cause them to disengage from their communities. In this way this proposal runs counter to TEAC's own philosophy. From the point of view of adult students and potential students (as well as many others) this will have several negative effects. There may well be fewer opportunities, facilities and resources available within universities to provide the support necessary to enable students who have previously missed out on education

to bridge the gaps and re-engage as adults (p. 154). In addition such students are likely to lose the opportunity to engage at undergraduate level with university teachers who are also active researchers - a key motivating factor for many adult students (as well as others).

In addition, despite the fact that TEAC's fourth report (p. 19) predicts long-term increases in the number of older learners, and in spite of the recognition by TEAC in its earlier reports of the value of lifelong learning and the importance of experience and the recognition of prior learning, it seems that TEAC's fourth report does not give full recognition to the considerable value of the traditional more or less open entry for adults to many tertiary education programmes. In opting for a relatively extensive merit-based system of entry to all undergraduate degree places based on a new, higher entrance qualification (p. 64-66), the Commission seems to conclude, in spite of some ambivalence, that one set of measures of merit should be made to fit all potential undergraduate students. This conclusion is unacceptable from the perspective of a progressive understanding of lifelong learning. There is a good deal of evidence to suggest that many people from working class backgrounds and especially women and Maori are far more likely to move into tertiary study as mature students than as students straight from school, and that, with adequate support, they are likely to do so successfully. In the interests of equity and to ensure that those who miss out on formal schooling at age 15, 16, 17 or 18 are encouraged to re-engage when they are somewhat older, a high degree of open entry for mature students should be retained. Although bridging courses have their place, it may be argued that they should not constitute further unnecessary hurdles to be overcome before re-entry.

With regard to adult and community education, it is clear that TEAC has drawn substantially on the report of the Adult Education and Community Learning Working Party (Adult Education & Community Learning Working Party, 2001) to formulate its proposals for the funding of ACE. This report recommended that ACE should be funded through a 'separate ring-fenced fund' (Tertiary Education Advisory Commission, 2001a p. 35). Although such a fund may well be appropriate and necessary to ensure adequate, ongoing public funding of some forms of ACE (and in particular those forms of community-based, independent forms of education which have been very badly neglected and devalued for a number of years), I am not convinced that all forms of ACE should be funded by government in this way. As noted in the Working Party's report, ACE is a highly differentiated sector and learning opportunities within ACE range from those offered by community groups and voluntary organisations to those offered by schools, polytechnics, colleges of education, wananga and universities. Some forms of ACE, including that provided by universities, may best be funded by other means which include the proposed Single Funding Formula based on their charters and profiles. In particular, then, I have serious reservations concerning:

- any proposal to fund the total university contribution to ACE through a separate ring-fenced fund. This would have the effect of further marginalising these contributions and functions within the universities themselves.
- the likely effects of establishing a separate ACE ring-fenced fund along the lines indicated in ghettoising or marginalising ACE within the wider tertiary context. This would be particularly serious if ACE providers were to be precluded from seeking public funds from other tertiary sources including access to research funds and the Strategic Development Fund (Tobias & Pearman, 2002).

It may be argued, as the Adult Education and Community Learning Working Party has done, that the funding of all forms of ACE from a single dedicated fund together with the distribution of these funds through the proposed local and national networks is necessary to promote and ensure cooperation between institutions and community organisations engaged in ACE programmes. I would argue however that local and national networks are currently insufficiently well developed and may over time be insufficiently robust or stable to manage the funding allocations required. Moreover there are other mechanisms available within the proposed TEC structure to ensure that ACE providers remain committed to the kinds of goals and processes required for cooperative and participatory programme development. These mechanisms could be provided within the framework of charters and profiles and I would support the establishment of a small but strong ACE Board as recommended by the ACE Working Party.

Conclusion

This chapter has explored the history of universities in New Zealand with special reference to their contributions to lifelong learning and adult education. The report of the Hughes Parry Committee in 1959 was a watershed in their development, and the following decades saw the almost continuous expansion of formal university enrolments. From the time of the tertiary reforms of the early 1990s the universities, along with other private and public tertiary education institutions, grew even more rapidly in response to the highly competitive demand-driven funding system which allowed little scope for co-operative strategic planning on a regional or national basis. At the same time levels of state funding per student fell steadily resulting in increasing fees and rapid increases in student loans, and this among other things had the effect of increasing pressures on university staff and students as well as increasing shifts towards entrepreneurialism and managerialism.

The change of government late in 1999 and with it the re-emergence of more progressive lifelong learning discourses however provided a somewhat different environment within

which universities can examine afresh the implications of lifelong learning discourses for their policies and practices. At a difficult time in our history when all universities are under pressures to be ever more productive with ever fewer resources, it is perhaps not the best of times to be undertaking such a re-assessment. On the other hand, such a re-assessment may lead to new initiatives and new ways of addressing some of the sources of these pressures by drawing both on the new and on the best of earlier traditions.

In spite of these serious difficulties it may be argued that the universities should continue, as recommended by the Hughes Parry report in 1959, to act as ‘centres of research and speculative thought’ while serving their communities by ‘supplying the educated and professionally trained graduates required by society’ as well as providing continuing learning opportunities for professional people and others interested. They should continue to act as a ‘critic and conscience of society’ and look to contribute in a variety of new ways to education for active citizenship. They should move away from the highly competitive market model promoted in recent years, looking to re-establish a strong local and regional presence, while also strengthening their international standing in both research and teaching. They should look to maintain open entry policies for adults and to strengthen the pathways and networks between the universities and other groups and organisations to enable people to move easily into and out of formal and nonformal university study throughout their lives. This, together with greater flexibility of time-tables, formats and methods, which should include more effective use of advancing information and communication technologies, will encourage more people of all ages to undertake formal and nonformal university studies, especially if this can be combined with efforts to develop both formal and nonformal programmes to meet the changing social, political, economic and cultural interests and requirements of various communities. Finally, they should look to maintain and enhance current ways of achieving curriculum innovation. Greater levels of responsiveness may be called for to respond to the need for a more inclusive society: this could entail responsiveness to a range of interests within the universities including staff and students as well as to a range of constituencies beyond the universities.

Section 4

Conclusion

This fourth and final section consists of one chapter which attempts to summarise some of the key policy implications and research questions arising out of the studies contained in this book.

Chapter 12

Conclusion: some implications for policy and research.

In this final chapter my aim is to highlight some of the key implications for research, policy and practice which arise out of the studies and discussions contained in this book. The issues addressed have been wide-ranging and in most cases the discussion has been far from complete. What I hope however is that readers will have come away from it better informed on a number of aspects of lifelong learning and adult education, and that the issues addressed will have been addressed in sufficient depth to advance our understanding. I also hope that the discussions will have had the effect of stimulating readers to pursue their own research on these issues. I believe that the studies reported in this book have made the following contributions.

Firstly, the discussions in this book (and especially in chapter 2, 3 and 6) have been intended to illuminate changes in the discourses on lifelong learning and adult education policy over the period from the early 1970s to the early years of the 21st Century. In doing so I believe that they provide support for interpretations of lifelong learning and adult education which locate them in their broad historical contexts and which link them closely with a critical theory of society. The evidence suggests that, although the advocates and supporters of lifelong learning may come from across the political spectrum, they have tended to be drawn, not so much from the ranks of corporate executives, nor from among neoliberal economists and politicians from the right, but rather from those on the political left and centre left. I have emphasised the value of the kind of definition and interpretation of lifelong learning adopted by the Council of Ministers of Education of Canada in 1993 which was drawn on by TEAC in its first report in 2000. In this interpretation, lifelong learning is seen as central to the very future of society, since this future depends crucially on the existence of an informed and educated citizenry. In this interpretation, learners are seen first and foremost as citizens rather than as consumers, who not only fulfil their own goals, but also contribute to social, economic, political and cultural development and engage in learning while making these contributions. In this view both lifelong learning and adult education contribute to a wide range of objectives. It is a view which reflects a broad and inclusive understanding of lifelong learning and adult education.

Secondly, the discussions in several chapters have drawn attention to the impact of neoliberal economic and social policies on a variety of educational forms and practices. In particular they have highlighted the way in which neoliberalism, which views lifelong learning and adult education as a private service or commodity which should be driven primarily by the demands of the market place, has led among other things, to the running down of the voluntary sector,

the underfunding of universities and other public tertiary institutions, and the growth of student debt.

Thirdly, the discussions in this book, and in particular the findings presented in chapter 4, have pointed to a number of trends in the participation by adults in education over the period between the mid-1970s and mid-1990s. These include the following: The percentage of the population between 16 and 64 years old who participated in at least one educational programme over a twelve month period rose from 34% in the mid-1970s to 47.5% in the mid-1990s. This growth reflects increased participation by young adults in formal tertiary studies leading to credentials. At the same time it seems that there may have been some reduction in participation rates in other kinds of programmes, especially among older adults and among Maori. The overall growth parallels that in other OECD countries, and in both the mid-1970s and the mid-1990s the levels of participation in New Zealand Aotearoa were higher than in most other countries including all the other English-speaking countries with which we commonly compare ourselves. Overall it seems that the period was marked by a rise in instrumentalism and greater pressures towards credentialism. The data suggest that it was the strengthening of these factors rather than any overall growth in participation that was the most significant feature of the period.

Fourthly, the discussions in this book and especially in chapter 4, have identified some ways in which future survey research on participation in Aotearoa New Zealand could be improved. I hope that these discussions will (a) stimulate further quantitative and qualitative studies of participation, (b) help future researchers to avoid re-inventing the wheel, and (c) provide the basis for a move away from 'snap-shot' surveys toward studies which build pictures of participation trends and patterns over a period of time (essential if we are to identify the impact of policy changes).

Fifthly, discussions in several chapters have pointed to the fact that policies and practices of learning and education are not politically neutral or culturally innocent. Chapter 5 sheds light on some of the realities of working class life and on some of the ways in which experiences of class and gender affect the learning and educational patterns of women and men from working class backgrounds. It also identifies some ways in which the views and perspectives on learning and education of adults from working class backgrounds are affected by their experiences of family, schooling, paid and unpaid work and leisure. In some respects the experiences and perspectives of all or most people from working class backgrounds are similar, while in other respects these experiences and perspectives differ widely. Thus for example, as children, all those interviewed had experienced a sense of social distance, dislocation or separation between home and school. On the other hand different people made

sense of these experiences in different ways, and the chapter identifies some of the ways in which different women and men seek to take control of their own lives and shape their own destinies.

Sixthly, the discussions here and especially the findings and discussion in chapter 5 refute any simple or static model of educational motivation or any simple catalogue or categorisation of the reasons for participation by adults in educational programmes or of barriers to such participation. Instead of searching for some general or universal theory of participation the discussion in this chapter suggests that issues associated with educational participation and non-participation can only be understood through critical ethnographic research that is socially and historically grounded. Evidence is presented which draws attention to the complexities of human motivation to engage in learning and education.

Seventh, discussions in this book and especially those in chapter 5 present evidence which highlights: (a) some of the ways in which some people from working class backgrounds have been 'cooled out' of formal education (Clark, 1960), and (b) some of the ways in which some of these people thrive and succeed as adults when they are given the opportunity to return to study. In view of this, it is argued, we should do all we can to ensure that opportunities for those who wish to continue their formal education remain truly open to all. For some people from working class backgrounds it is crucial that the doors to formal credentialed education be kept open throughout the adult years. These are the people who are likely to benefit most from adult entry programmes, policies that seek to recognise prior learning, and increasing opportunities for open learning.

Eighth, discussions in this book and especially those in chapter 5 present evidence suggesting that certain forms of education, and especially those driven primarily by the demands of economic survival in the labour market or by growing credentialism, continue to be seen as irrelevant or oppressive by many people from working class backgrounds, who nevertheless engage successfully in informal and nonformal education and make a substantial contribution to the community in a variety of ways. This evidence suggests that: (a) nonformal and informal credential-free adult education should continue to be supported and developed as a significant component of any education system in the future, and that such programmes should seek to provide resources and support for those unlikely ever to make demands on the formal system, but who may be, or may become, active independent learners; and (b) we should resist those policies and practices which impose undue pressure on people to continue their formal studies or which make people feel guilty or inadequate if they have not done this or that course or qualified for this or that certificate.

Ninth, discussions in this book and especially those in chapter 5 provide evidence which suggests that important forms of learning and education take place in everyday situations - in the workplace, family, community organisations and groups. This evidence suggests that these forms of learning and education should receive greater recognition and support and that employers and trade unions, family and cultural groups, health, recreational and community clubs and centres sports clubs and interest groups, etc. should be encouraged to become more involved in supporting such learning and education. In particular greater involvement by employers and trade unions in supporting, encouraging and providing work-related and non-work-related education and training programmes should be encouraged, and consideration should be given once again to the development of trade union education.

Tenth, discussions in this book and especially those in chapter 6, have documented a number of trends and patterns in the curriculum of lifelong learning and adult education during the period between the early-1980s and the mid-1990s. The findings highlight the rich diversity of this curriculum; they also draw attention to substantial overall growth in the number of all kinds of programmes organised as well as more specifically in the number of courses and classes offered. The evidence suggests that the most significant increases took place in job-related programmes which came to occupy an increasingly dominant position in the curriculum. In spite of this, courses in other areas also saw substantial increases. Thus for example about two and a half times more hobby-related classes were offered in 1995 than in 1983. Nevertheless, even with these increases, hobby-related classes as well as classes in other fields came to occupy a somewhat less prominent position than vocational classes within the total adult education curriculum. Moreover, the number and proportion of adult education classes for active citizenship fell away significantly over the period.

Eleventh, discussions here, and especially those in chapters 7 and 8, present evidence of some of the ways in which educational institutions (schools, colleges, polytechnics and universities), NGOs and independent community groups contributed during the 1980s and 1990s to democratic understanding and action through the organisation of adult education and action programmes intended to promote, inform, analyse, critique, challenge, or raise public consciousness about public policies or issues. In particular, chapter 7 documents some of the contributions made by one small voluntary organisation, the Canterbury WEA, to lifelong learning and adult education generally and more specifically through its programmes focusing on public issues. This evidence suggests that NGOs and community groups as well as universities and polytechnics make significant though very different contributions to adult education for democratic understanding and action. The contributions by schools in this area are more limited and there is no evidence of private providers making any contribution in this area. This evidence, it is argued, serves to highlight the importance of maintaining and

strengthening academic and intellectual freedom especially as these apply to universities and the organisations of civil society.

Twelfth, discussions in this book and especially those in chapters 6 and 8, present evidence of some of the ways in which educational institutions (schools, colleges, polytechnics and universities), NGOs and community groups and private providers have contributed to other forms of adult and community education in recent years. The evidence confirms an overall increase in the number of programmes offered, along with increasing competition between providers. It suggests an increase in vocationalism along with an increase in adult basic education programmes, hobby and recreational programmes and programmes leading to the award of certificates and diplomas. The biggest contribution in the vocational area continues to be made by polytechnics; whilst in the recreational area the biggest contributions are made by schools and community centres. In addition the evidence points to an increase in the proportion of the overall provision which is contributed by private providers. This is especially marked in the vocational area. However there has also been an increase in the private provision of programmes associated with the sale of goods and services in the leisure industry.

Thirteenth, on the basis of the evidence presented in this book as well as other evidence I have argued for the following policies: (a) NGOs and not-for-profit community-based and iwi-based voluntary organisations, independent community groups, etc. should be eligible to receive state funding to enable them to provide their own independent forms of lifelong learning and adult education. Eligibility criteria should be broad enough to allow for the state to fund or subsidise NGOs and other organisations and groups offering programmes both within and beyond the qualifications framework. (b) Public educational institutions (universities, polytechnics, colleges of education, wananga and schools) should be encouraged to support and cooperate with rather than compete with these NGOs and community groups and vice versa. Those not-for-profit organisations offering TOP and other employment-related programmes should cease to be called Private Education or Training Providers. (c) Public educational institutions (universities, polytechnics, colleges of education, wananga and schools) should continue to receive state funding to support their programmes of lifelong learning and adult & community education. Criteria for such funding should relate to the institutions' charters and profiles which should include indications of the ways in which institutions propose supporting or cooperating with NGOs and other voluntary organisations. (d) Companies and other corporate bodies driven by commercial objectives, i.e. true private education and training providers, should not normally be eligible to receive state subsidies or funding for the provision of education and training programmes except for their own employees. Where such funding might be considered similar criteria to those referred to in (b) & (c) above should be applied. This would include provision for the election and appointment

of members of governing councils or boards of management to represent the various constituencies served by the providers as well as the public interest.

Fourteenth, discussions in this book and especially those in chapter 9 have sought to further our understanding of the ways in which the material conditions of late-capitalism, and the discourses to which these have given rise in Aotearoa New Zealand, have influenced a wide range of policies and practices. In particular chapter 8 focuses on the establishment of the Qualifications Authority and the new qualifications framework in the late-1980s and early-1990s. It documents the impact of the dominant economic and political forces (including increasing unemployment and underemployment and increasing casualisation and de-skilling of many jobs) on the development of the framework. It also undertakes a critique of the ideology of individualism, promoted under the new framework, which underpins the expansion of global capitalism. In the light of this it is argued that it is necessary for educators to go beyond the task of helping individuals escape from poverty and ignorance or climb the pyramid or ladder of opportunity; we must move beyond a welfarist and narrowly skills-based approach to education and training. In addition, I argue, we must go on to use the framework to legitimate educational and action programmes which encourage participants to question and challenge the structures of inequality and subordination, and we must work politically and educationally to secure a place in the sun for those programmes which do not fit within the qualifications framework.

Fifteenth, discussions in this book and especially those in chapter 10, have documented a number of educational programmes for older adults established during the period from the early-1970s to the early 2000s. With a view to informing future educational organisers and policy-makers, these discussions have also identified some of the themes and issues arising out of this experience. Attention has been drawn to the considerable overall growth in the number of programmes for older people as well as to the very wide range of different kinds of programme. This discussion has highlighted the fact that the need to provide for lifelong learning and adult education opportunities for older people (and younger people as well) has been widely recognised both locally and internationally. This includes increased recognition of the importance of ensuring that all older people have the opportunities and resources to continue to learn on equal terms and in appropriate ways and that their skills, knowledge and abilities are recognised, valued and used in particular intergenerationally. At the same time attention has been drawn to the divide which currently exists and seems to be growing both locally and globally between the more privileged who are able to gain access to learning opportunities and who are in the position to make a significant contribution and those who have few resources and little opportunity to contribute may well have grown considerably especially over the past fifteen years. The discussion suggests that a reliance on market forces

and voluntary effort alone without considerable support and provision by the state and its agencies necessarily reproduces and exacerbates the material, cultural, political and social divisions between rich and poor within and between generations.

Sixteenth, discussions in this book and especially those in chapter 10, have presented evidence of a striking lack of leadership by successive governments from the mid-1980s to the late-1990s in relation to the education of older adults. This occurred as a consequence of the increased reliance placed on market mechanisms for the delivery of services, and as public funds were withdrawn from voluntary organisations and independent community groups which have attempted to develop their own programmes and gain a sense of ownership of these programmes. There is evidence to suggest that many of the most innovative of the programmes identified were starved of financial backing and recognition. In the light of this it has been argued that future funding policies should be directed not only at encouraging innovation but also at the task of sustaining voluntary organisations and independent community groups to enable them to devote their energies to the tasks of offering programmes rather than merely surviving. They should also be directed at providing adequate support for those educational institutions and agencies which demonstrate a genuine commitment to the education of older adults.

Seventeenth, the discussions in this book and especially those in chapter 11 have reviewed the history of universities in New Zealand with particular reference to their contributions to lifelong learning and adult education. I have argued that the report of the Hughes Parry Committee in 1959 was a watershed in the development of the universities and that the following decades saw the almost continuous expansion of formal university enrolments. From the time of the tertiary reforms of the early 1990s the universities, along with other private and public tertiary education institutions, grew even more rapidly in response to the highly competitive demand-driven funding system which allowed little scope for co-operative strategic planning on a regional or national basis. At the same time levels of state funding per student fell steadily resulting in increasing fees and rapid increases in student loans, and this among other things had the effect of increasing pressures on university staff and students as well as increasing shifts towards entrepreneurialism and managerialism.

Finally in the discussions in this book and especially those in chapter 11 I have argued that the change of government late in 1999 and with it the re-emergence of more progressive lifelong learning discourses however provided a somewhat different environment within which universities could examine afresh the implications of lifelong learning discourses for their policies and practices. While acknowledging that the times are difficult ones for universities, I have argued that a re-assessment is essential and that it might lead to new initiatives and new

ways of addressing some of the sources of the pressures by drawing both on the new and on the best of earlier traditions. In undertaking such a re-assessment I have argued that universities should continue to act as ‘centres of research and speculative thought’ while continuing to serve their communities by ‘supplying the educated and professionally trained graduates required by society’ as well as providing continuing learning opportunities for professional people and others interested. They should continue to act as a ‘critic and conscience of society’ and look to contribute in a variety of new ways to education for active citizenship. They should move away from the highly competitive market model promoted in recent years, looking to re-establish a strong local and regional presence, while also strengthening their international standing in both research and teaching. They should look to maintain open entry policies for adults and to strengthen the pathways and networks between the universities and other groups and organisations to enable people to move easily into and out of formal and nonformal university study throughout their lives. This, together with greater flexibility of time-tables, formats and methods, which should include more effective use of advancing information and communication technologies, will encourage more people of all ages to undertake formal and nonformal university studies, especially if this can be combined with efforts to develop both formal and nonformal programmes to meet the changing social, political, economic and cultural interests and requirements of various communities. Finally, they should look to maintain and enhance current ways of achieving curriculum innovation. Greater levels of responsiveness may be called for to respond to the need for a more inclusive society: this could entail responsiveness to a range of interests within the universities including staff and students as well as to a range of constituencies beyond the universities.

Conclusion

As I stated at the outset of this book, its focus has been on lifelong learning and adult education in Aotearoa New Zealand in the late-twentieth and early twenty-first centuries. The implications and questions arising out of the various studies, which I have summarised in this chapter, are necessarily focused on the situation in Aotearoa New Zealand. However, in spite of the fact that the subject matter covered by the book is necessarily focused on a particular time and place, I believe that many of the themes addressed are common to other times and places. I hope therefore that the book will have appeal not only to readers in this country, but that students and scholars, practitioners and policy-makers in other countries will also find it interesting and useful.

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